



# Healthy School, **Healthy Staff**, Healthy Students

A Guide to Improving School Employee Wellness



NATIONAL ASSOCIATION OF  
**CHRONIC DISEASE DIRECTORS**

Promoting Health. Preventing Disease.

# Acknowledgements

The National Association of Chronic Disease Directors extends its appreciation to the following individuals who provided valuable input on this guide. Their affiliations were current as of their most recent involvement. This guide does not necessarily represent the official views of these individuals or their respective organizations.

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This publication was supported by Cooperative Agreement #5U380T000225-5 funded by the Centers for Disease Control and Prevention. Its contents do not necessarily represent the official views of CDC or the Department of Health and Human Services. This publication is provided for educational purposes only and is not to be construed as providing legal or medical advice. The information and recommendations in this guide are based on a review of published literature and resources as well as the guidance of experts and key stakeholders at the national, state, and local levels. In particular, information from CDC Workplace Health Promotion, OEA Choice Trust, and The Wisconsin Worksite Wellness Toolkit informed the content and structure of this guide. Resources are included in this guide to provide examples and additional information. Their inclusion does not imply endorsement, nor does it mean that these are the only resources available.

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**Published 2018**

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# Quick Start Guide

## Why start an employee wellness initiative?

Many employees have health concerns that impact their work. An evidence-based employee wellness initiative can improve employee health, increase productivity and performance, reduce absences, lower healthcare costs, and benefit students.

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**This guide provides a suggested process and resources for building or expanding an effective employee wellness initiative. It is not intended to be prescriptive or provide a pre-packaged program. The information is based on the experience of other school districts and experts in the field as well as research findings.**

## Who should use this guide?

This guide is a resource for districts and schools with no prior experience with employee wellness initiatives as well as for those seeking to improve an existing initiative. It was written with diverse readers in mind. People in a variety of positions—from human resources directors to district superintendents to wellness coordinators—play a role in leading and supporting employee wellness initiatives. Though the guide was developed for public schools, most of the information will apply to all types of schools.

## How do I get started?

Most school employee wellness initiatives start small—perhaps with one exercise class—and expand over several years. School employees are extremely busy and have limited resources. Districts and schools are encouraged to take whatever steps they can to advance employee

## Using This Guide

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- **Want to start small?**

Check out the **“FIRST STEPS”** at the start of each chapter.



Or, for a very simple approach, conduct an employee needs and interests survey (p. 24), then use the results to select one or two of the offerings listed in [Appendix 1](#).

- **Ready for a comprehensive initiative?**

Follow the steps outlined in each chapter of the guide.

- **Looking to go deeper?**

Refer to the **“RAMP IT UP”** sections (look for this icon!) and additional resources listed throughout the guide.



- **Already have an initiative in place?**

Review the topics and tools related to areas you'd like to improve or expand.

wellness and to build their initiative over time. Following this guide from cover-to-cover is not required. Choosing a few employee wellness activities and implementing them well is more beneficial than developing a comprehensive plan that is never put into action.

# Quick Start Guide



## My district has no extra resources. Can we start an employee wellness initiative?

Yes! There are many no-cost, low-effort offerings that can be put in place to support employee wellness. Your district may even see the benefit of these activities and decide to commit resources to building a more comprehensive initiative.

## What are the steps to developing an employee wellness initiative?

- 1. Build support:** Gain support from district and school leadership, employees, and other stakeholders.
- 2. Assemble a team:** Identify a committee, leader(s), and champions.
- 3. Gather information:** Identify needs and strengths to target your wellness offerings.
- 4. Plan for success:** Develop and implement a written plan to guide the initiative.
- 5. Maximize your impact:** Use effective communication techniques and strategies to boost participation.
- 6. Demonstrate results:** Collect data to show the impact of your initiative and share it with stakeholders.
- 7. Maintain momentum:** Use strategies to keep your initiative going strong.

## Where can I find ideas for employee wellness activities and events?

[Appendix 1](#) lists numerous ideas for activities, campaigns, policy changes and more related to a variety of wellness topics, such as physical activity, nutrition, substance use, and social-emotional health.

# Introduction

All schools aim to prepare students for success, not just in academics, but in life. Recognizing that student achievement is influenced by a variety of factors, many schools are implementing programs to support the physical, social, and emotional health of students to help them reach their full potential.

**Just as children need to be healthy, safe, engaged, challenged, and supported to perform to their highest ability, so do the school employees who are charged with educating, guiding, nurturing, and protecting them.**

Whether teaching students in the classroom, running the school, maintaining buildings, or providing safe transport, every school employee contributes to a school's mission. However, employees can only give their best when they are feeling their best. Supporting school employee wellness is an important way to communicate that each staff member is respected and valued.

Districts and schools can use this guide to start or expand an employee wellness initiative that will benefit both employees and students.

The first chapter in this guide provides background information, including the benefits of employee wellness initiatives and key strategies for designing a successful initiative. The subsequent chapters provide practical direction for establishing or enhancing an employee wellness initiative. The steps outlined in the guide will allow each district and/or school to develop an initiative that fits their unique needs.



The guide includes worksheets, tools, and additional resources for each step of the process. Stories from school districts that have successfully implemented employee wellness initiatives provide real-world examples.

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**“Our employee wellness program energizes employees, enables positive relationships, and ultimately contributes to a more dynamic learning environment for students.”**

— Beth Dittman, *Director, Health Services, Mesquite Independent School District, Mesquite, Texas*

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## Ch.01

# School Employee Wellness: Investing in Your Greatest Resource

### Chapter summary

- Employee wellness initiatives support a broad range of employee needs, including physical, emotional, and financial well-being.
- A comprehensive, evidence-based employee wellness initiative can boost staff productivity, morale, performance, and retention while improving student outcomes and decreasing costs.

“We spend 83% of our budget on personnel. We invest in maintaining our buildings and vehicles, so why wouldn’t we invest in maintaining our greatest resource — our people?”

— Michael Carter, Superintendent, Rainier School District, Rainier, Oregon

### Employee wellness: What it is and why it matters

Many people think of wellness initiatives as focused on diet and exercise. However, the concept of wellness is much broader. **Wellness includes physical, emotional, social, spiritual, environmental, intellectual, career, and financial health.**<sup>1,2</sup> Wellness influences how people feel and function in their daily lives and in their jobs. Yet, as shown by the statistics in the infographic on p. 10, many employees are not in good health,<sup>3</sup> and their work performance suffers as a result.<sup>4-7</sup>

**TIP:** Any action to support employee wellness is a positive start. Take whatever steps are feasible and build upon those efforts over time!

**1/2** Half of adults have one or more chronic diseases.<sup>3</sup>

**Nearly 65%** adults are overweight or obese.

**3/4** of adults do not eat enough fruits and vegetables, and only 1/2 meet physical activity recommendations.<sup>8</sup>

**17%** of adults report smoking, binge drinking, and depression.<sup>8</sup>

**1/3 of teachers** report inadequate sleep, which is associated with higher risk for **diabetes, hypertension, and obesity.**<sup>9</sup>

**51% of teachers** report feeling great stress at least several days a week,<sup>10</sup> higher than any other occupational group.<sup>11</sup>

**STRESS is linked to high blood pressure, weakened immune system, stroke, and heart disease.**<sup>6</sup>

*This guide will primarily use the term “wellness,” but “health” and “well-being” will also be used interchangeably. The term “staff” will be used interchangeably with “employee” and includes teachers, administrators, support staff, and others employed by the school or district. See the Glossary for definitions.*

Physical and emotional health concerns can lead to higher rates of absences and presenteeism (working while unwell at reduced capacity), as well as lower productivity and performance.<sup>8-11</sup> Teacher stress is linked to burnout, reduced job satisfaction, lower student academic performance, and higher turnover, with the cost of turnover in schools estimated at over \$7 billion nationally each year.<sup>7</sup> **Among US workers, health-related lost productive time costs employers an estimated \$1,685 per employee each year.**<sup>12</sup>

### Benefits of an employee wellness initiative

The Centers for Disease Control and Prevention (CDC) defines employee wellness initiatives as “a coordinated set of programs, policies, benefits, and environmental supports designed to address multiple risk factors and health conditions to meet the health and safety needs of all employees.”<sup>13</sup> Employee wellness initiatives have a number of benefits.

**For employees:** Research demonstrates that comprehensive, evidence-based wellness

**initiatives can make a difference in employee health.** Employee wellness initiatives can reduce problems such as stress and substance use, improve nutrition and physical activity, and help employees lower their cholesterol and blood pressure.<sup>7,14-18</sup>

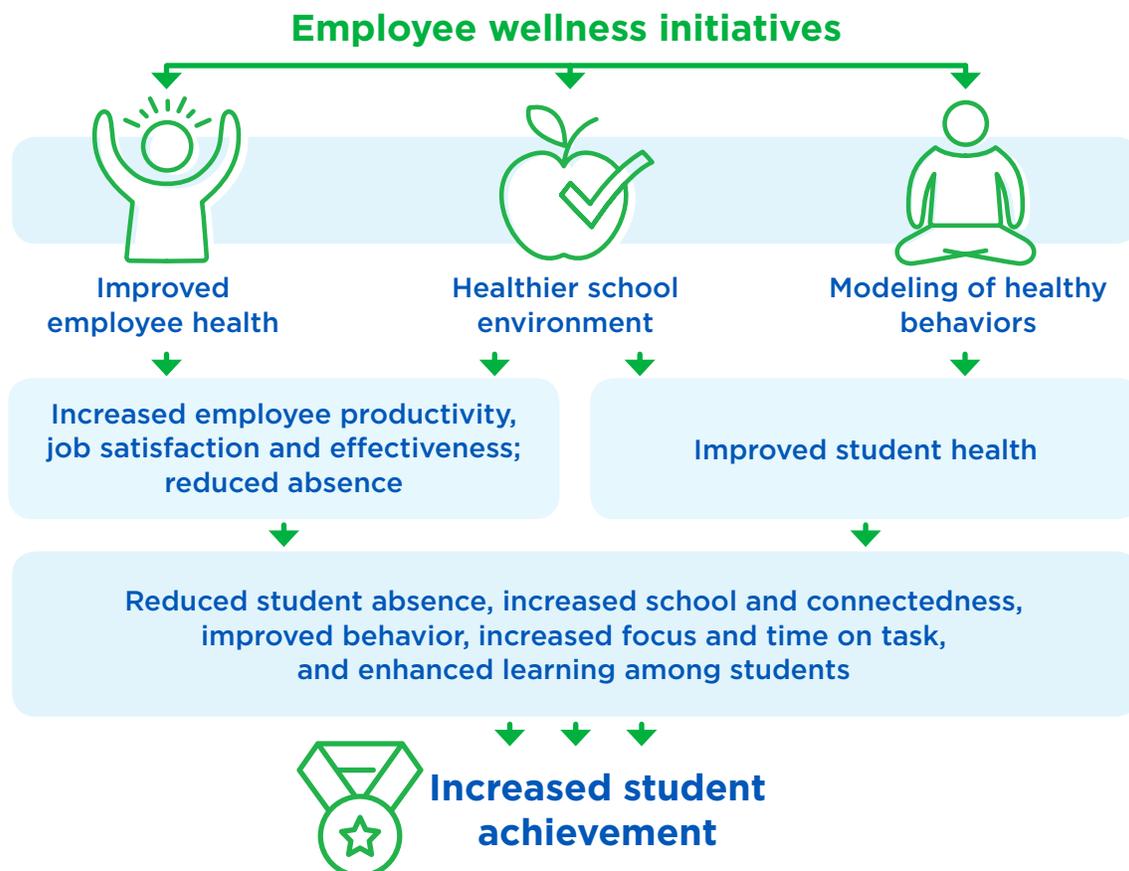
**For employers:** When employee health improves, so does productivity and performance. For example, one study found that school employees who met the recommended levels of exercise, sleep, and fruit and vegetable consumption reported higher job performance and fewer absences.<sup>18</sup> In another study, employees who felt their workplace supported healthy living—even if they did not themselves make changes in their health—had lower levels of presenteeism.<sup>19</sup>

Districts also have noted improvements in team cohesion, employee retention, and recruitment resulting from employee wellness initiatives.

From a cost perspective, studies have shown that a comprehensive, evidence-based employee wellness program can generate a positive return on investment ranging from \$1.6 to \$3.9. This means that for every dollar invested in employee wellness, employers may save between \$1.60 and \$3.90 through reduced healthcare costs and absences.<sup>20-24</sup> These returns typically take several years to achieve.

**For students:** In the school setting, supporting employee wellness also benefits students, as shown in Figure 1. Enhancing employee wellness improves staff performance, which can improve

Figure 1: Potential Impact of School Employee Wellness Initiatives on Students



student learning and behavior. Employee wellness initiatives also contribute to a healthier school environment, and school staff who are engaged in improving their own wellness are more likely to model healthy behaviors and promote student wellness activities.<sup>25</sup> This contributes to student health and, in turn, to student achievement.

## Strategies for success

Research and practice have identified several strategies that can help you establish a successful employee wellness initiative.

### Build a healthy school environment

Creating a healthy school environment by developing policies, practices, norms, and physical infrastructure that support wellness is highly effective.<sup>1,24,26-29</sup> It is easier for people to make healthy choices when the environment around them is supportive. For example, employees are more likely to eat a nutritious lunch if their workplace has healthful options available onsite. Districts and schools have a great starting point for establishing a healthy school environment, as many already have fitness facilities, stairwells, and a cafeteria, all of which can support employee wellness. In addition, many districts have existing student wellness policies, comprehensive school physical activity programs, and other health-related initiatives that can be expanded to include staff.

Creating a healthy school environment is cost-effective, sustainable, reaches large numbers of people, and requires little time commitment once the changes are made. District and school leaders play an important role in this strategy since implementing these changes requires support from the top.

#### Examples of healthy school environment approaches:

**Policy-** Implementing a policy that allows staff to purchase healthy meals from the cafeteria at a discount

**Practice-** Allowing time for staff and students to take physical activity breaks together

**Norms-** Leadership participating in wellness offerings to set the tone and encourage others to participate

**Infrastructure-** Providing quiet spaces for mindfulness, deep breathing, and other stress relief approaches

### Integrate with existing efforts

Employee wellness aligns with many existing efforts within school districts. A prime example of this is the Whole School, Whole Community, Whole Child (WSCC) model, which many districts and schools use to guide their health and wellness initiatives. Developed collaboratively by the CDC and ASCD, the WSCC model provides a framework for integrating health and learning to create an environment in which students can reach their full potential. Employee wellness is one of the 10 components of the WSCC model, reflecting the connection between employee wellness, student wellness, and student achievement.

Districts and schools can include employee wellness within their WSCC plan, wellness policy, or other student wellness work. Districts also can incorporate employee wellness into school improvement plans, link employee wellness with state accountability metrics, or align employee wellness goals with the district's mission. Integrating with existing efforts increases efficiency, buy-in, and sustainability.<sup>29-31</sup>

### Allow for customization

Effective wellness initiatives are inclusive of all employees and customized to the needs, interests, culture, and available resources of a district or school.<sup>22,24,30,32</sup> Participation will be higher if the initiative accommodates varying interests, fitness levels, and schedules and is accessible to employees in different locations across the district.<sup>15,22,30,4,6</sup> This guide is designed to help districts and schools develop a tailored initiative. In large districts, each school or building may benefit from a unique approach.

 **TIP:** Employee wellness can be viewed as part of a coordinated approach to building a healthy environment for everyone in the school community, students and staff alike.

### Steps for building an employee wellness initiative

The remainder of this guide provides information, resources, and tools on the following steps to assist districts and schools in building a successful and sustainable employee wellness initiative:<sup>1,15,24,26,29,30,33,34</sup>

- 1. Build support:** Gain support from district and school leadership, employees, and other stakeholders.
- 2. Assemble a team:** Identify a committee, leader(s), and champions.
- 3. Gather information:** Identify needs and strengths to target your wellness offerings.
- 4. Plan for success:** Develop and implement a written plan to guide the initiative.
- 5. Maximize your impact:** Use effective communication techniques and strategies to boost participation.

### Benefits of effective school employee wellness initiatives:

- Improved employee health
- Greater staff productivity and performance
- Increased retention and enhanced recruiting
- Reduced presenteeism and absences among staff
- Lower healthcare costs
- Improved student outcomes



**6. Demonstrate results:** Collect data to show the impact of your initiative and share it with stakeholders.

**7. Maintain momentum:** Use strategies to keep your initiative going strong

**If your district or school has any of the following already in place for staff, you are off to a great start!**

- ✓ Tobacco-free campus policy
- ✓ Healthy food and beverage options
- ✓ Food preparation and storage facilities (e.g., microwaves, refrigerators)
- ✓ Onsite exercise facilities
- ✓ Classes or materials on health topics
- ✓ Employees trained in CPR/AED use
- ✓ Onsite flu vaccination
- ✓ Insurance coverage for preventive services
- ✓ Paid time off for vacation and sick days

## Chapter resources

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- [In This School District, Health and Wellness Start with Teachers](#) (Education Week) — video showing the impact of employee wellness on school staff
- [Staff Wellness Ideas to Make Your Whole School Healthier](#) (Alliance for a Healthier Generation) — video with tips on implementing an employee wellness initiative
- [Success Stories](#) (OEA Choice Trust) — examples of successful employee wellness initiatives
- [The Whole School, Whole Community, Whole Child Model: A Guide to Implementation](#) (National Association of Chronic Disease Directors) — guidance outlining the steps to implementing the WSCC model in districts and schools



## Ch.02 | Build Support

### Chapter summary

- Gaining buy-in from district and school leadership, employees, and other key stakeholders is an important step.
- Reach out to stakeholders early in the process using messaging that will be meaningful to them.
- Continue to build support as the initiative moves forward.

#### FIRST STEPS



Focus on getting approval to try out one or two inexpensive or no-cost employee wellness activities.

### Stakeholder support

Involving stakeholders early on makes planning and implementing an employee wellness initiative much easier by bringing in additional help and resources, making the approval process run more smoothly, and generating excitement about the initiative.<sup>15,22,24,27,30</sup> A stakeholder is any person or organization that affects or is affected by the initiative. This includes school board members, district and school administrators, and employees. Many districts also find it helpful to engage the district's benefits providers, union leadership, and parents/caregivers.

**Building support is an ongoing process.** As your initiative takes shape, you may identify new stakeholders to engage. In addition, many districts and schools have considerable turnover. Engage new staff (particularly administrators) as they come on board to maintain buy-in for the initiative.

## Engage district and school leadership

Support from school board members and collaboration with district and school administrators provides a strong foundation for a successful initiative.<sup>15,24,33</sup> District and school leaders such as the superintendent, principals and vice principals, human resources and business/operations staff, and other supervisory staff can contribute in various ways, which could include the following (depending on individual roles and responsibilities):

- Communicating with employees about the initiative and its importance;
- Sharing information that can be used for planning;
- Allocating resources such as staff time, space, and funding;
- Approving program plans;
- Facilitating changes to policy, practice, and infrastructure;
- Offering wellness education during in-service time;
- Encouraging participation by modeling healthy behaviors and participating in wellness offerings; and
- Including employee wellness in strategic planning, school improvement plans, district evaluation, etc.

School board members and administrators care about employee wellness, but it is difficult for them to invest resources into any initiative unless it can advance the outcomes that they prioritize and are accountable for: student achievement and the district's bottom line.

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**TIP:** Make sure to follow district protocols and norms when reaching out to stakeholders. For example, you may need the superintendent's permission to speak with school board members.

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To obtain leadership buy-in:

- Present the case for employee wellness (see [Chapter 1](#)). If available, include data on staff absences, healthcare costs, and other data specific to your district or school.
- Demonstrate how employee wellness aligns with the district's goals, objectives, and other school health initiatives.

See [Appendix 2](#) for a sample communication.

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**TIP:** Make sure to show appreciation for supporters of the initiative. A short thank-you note or an acknowledgment when speaking about the initiative are quick and easy ways to express gratitude.

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## Build employee buy-in

Building employee buy-in will boost participation in and excitement about your initiative. Engage employees in all types of positions, from bus drivers to teachers to nutrition services staff. Employees can be involved in the following activities, which are discussed in greater detail later in this guide:

- Planning the initiative,
- Completing surveys,
- Providing feedback on the initiative,
- Participating in the initiative, and
- Serving as wellness champions.



**TIP:** Reach out to employees who have concerns or are not interested in participating. Addressing their objections will strengthen your initiative.

To gain support from employees, use the following approach:

- Demonstrate a genuine commitment to employee health.
- Describe the benefits of the initiative.
- Explain how privacy will be protected and emphasize that participation is voluntary.
- Provide opportunities for employees to provide input and participate in planning.
- Use messages and images that are respectful, inclusive, and realistic.

See [Appendix 2](#) for a sample communication.



## Consider other potential stakeholders

### Benefits providers

Benefit design is a key component of employee wellness initiatives.<sup>26</sup> Benefits providers include health, dental, and vision insurers; prescription benefit providers; employee assistance plan providers; and worker's compensation providers. Benefits providers may provide support for employee wellness programs at no cost to the district. Benefits providers can contribute in several ways:

- Providing free program materials and/or wellness services,
- Partnering to review benefit design,
- Providing information to help with planning the initiative, and
- Providing staffing and/or financial support.

Start by identifying the person within your district (e.g., benefits or human resources coordinator) who oversees employee benefits. As a next step, find out if your benefits providers already have employee wellness initiatives in your district and if there are supports they can offer.

### Unions

In some districts, a substantial number of school employees belong to unions. If this is the case in your district, consider involving union leaders in planning the wellness initiative. When reaching out to unions, highlight how supporting employee wellness aligns with both the district's goals and the union's core mission, and demonstrate a genuine commitment to employee health for its own sake. Be sure to notify district leadership before engaging union leaders.



**TIP:** Some districts have a joint insurance committee that includes district and union leadership. This is a good group to meet with to gain support and get input.

### Parents and caregivers

Gaining buy-in from families at the outset can be helpful. The best approach is to explain how employee wellness ultimately supports the health and success of students as well as being good for the district's bottom line. Parent association meetings, School Health Advisory Councils (SHACs), school newsletters, and messages from district or school leadership are great formats for educating parents/caregivers about the importance of employee wellness.



## Real-world success: Rainier School District

### Rainier, Oregon

**Location:** Rural **Approximate # of staff:** 120 **Approximate # of students:** 1,000 **Buildings:** 3 **Student demographics:** More than 50% of students qualify for free or reduced-price meals. **Annual employee wellness budget:** Approximately \$100 per employee, drawn from Medicaid Administrative Claiming funds, staff development budget, district in-kind, and a grant from OEA Choice Trust. **Employee wellness staffing:** The district's Nutrition Services Director/Wellness Coordinator spends about 8-10 hours/month and the Superintendent spends about 2-5 hours/month working on the initiative.

After seeing the benefits from its student wellness programs, Rainier School District began working to improve employee wellness in 2013 with help from an OEA Choice Trust grant. The main goals of the district's employee wellness initiative are to improve the overall wellness of staff, build healthy habits, increase staff attendance, and serve as a recruitment and retention tool. The initiative emphasizes physical, social-emotional, and financial wellness. Offerings include a wide range of activities such as flu shots, financial literacy classes, fitness classes, hiking groups, and monthly challenges. The district has created a healthy school environment, with nutritious lunches and a salad bar available in the cafeteria. The district also has developed a free fitness center and a school-based health center that are open to staff and community members. The district is located in a food desert, and there are no other fitness centers or physicians nearby, so these supports are key to helping district employees stay healthy.

Rainier has used a variety of strategies to build buy-in for their initiative. At the leadership level, the district has integrated employee wellness into its wellness policy as well as its strategic pillar on health and safety. The superintendent cultivates school board support on an ongoing basis and is actively involved in wellness activities, which encourages staff to participate. To build employee buy-in, the district has recruited champions to help generate excitement about the initiative. Rainier also conducts an annual employee wellness survey to ensure that programs meet

the needs and interests of staff. One finding from the survey is that many employees (including leadership) participate in the initiative for a sense of camaraderie and the opportunity to connect with colleagues. To address this, the district structures many of its activities to allow staff to develop relationships and to support each other in reaching their goals. Frequent email communications describe the value of wellness and focus on small steps employees can take to improve their health. Rainier has also engaged its unions, several partners, and community members in this initiative.

The initiative has been highly successful, with 89% of staff participating in at least one activity during the school year, 100% staff satisfaction with the initiative, and 87% of participants reporting health improvements. The district has seen increased retention and a 17% improvement in staff attendance, which translates to approximately \$9,000 in savings on substitute teachers annually. Keeping teachers in the classroom also benefits the students by maximizing the number of instructional days. Sharing reports on these outcomes with the school board and other leaders helps maintain buy-in for the initiative.

**Advice from Rainier School District: Build a team of leaders and champions who personally model healthy behaviors and truly believe in creating opportunities for school employees to take better care of themselves. When employees see a commitment from leadership, they take it seriously.**

### Chapter resources

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#### Tools and templates

[Appendix 2:](#)

- Worksheet: Initial outreach
- Sample initial communication to district and school leadership
- Sample initial communication to staff

#### Other resources

- [Guide to School Employee Well-Being through Collaboration](#) (Kaiser Permanente Thriving Schools) — detailed guidance on working with unions
- [School Employee Wellness Webinar Series](#) (Kaiser Permanente Thriving Schools) — includes webinars on getting started, championing employee wellness, and working with unions



## Ch.03

## Assemble Your Team

### Chapter summary

- Identify a committee to guide the employee wellness initiative. Start by connecting with existing groups that are working on topics related to employee wellness.
- Designate a leader or leaders, such as committee chairs, to oversee the initiative.
- Engage employee wellness champions to help implement the initiative, boost participation, and increase employee buy-in.

#### FIRST STEPS



Find out if an existing committee, such as the wellness committee, will help coordinate one or two employee wellness activities.

### Identify a committee

Having a diverse committee to provide guidance will strengthen your employee wellness initiative by bringing together multiple perspectives, increasing buy-in, distributing the workload, and providing structure. **Many districts and schools have existing groups working on topics related to wellness that are well-positioned to lead the employee wellness initiative**, such as a student wellness committee; Whole School, Whole Community, Whole Child (WSCC) committee; human resources benefits team; safety committee; School Health Advisory Council (SHAC); or school improvement team. If your district or school does not have an existing group that can lead this work, you can convene a new committee.

**For convenience, the term “employee wellness committee” will be used throughout the remainder of this guide, recognizing that in many cases, an existing committee will fulfill this function.**

### Committee membership

Whether you are forming a new group or working with an existing one, it is helpful to include diverse representatives on the employee wellness committee, such as employees with:

- Relevant knowledge, such as school nurses, health teachers, nutrition services, and physical education and athletics staff;
- Various types of positions, such as teaching, administration, human resources, facilities, and transportation;
- Diverse skills, such as communications, program planning, and evaluation; and
- Experience working on other school health initiatives.

Typically, five to 10 members is an effective size for a committee. Setting term limits can increase engagement and bring new perspectives into the group. Be clear upfront about the weekly time commitment and the length of service (e.g., one-year commitment).

**TIP:** If your district or school has a committee that is coordinating implementation of the WSCC model, it generally makes sense for that group to lead the employee wellness initiative, since employee wellness is a component of the WSCC model.



**“Don’t be afraid to take risks and try new ideas. You may fail at times, but if you have a strong team, you will be successful in the long run.”**

— Debby Webster, *Nutrition Services Director/Wellness Coordinator, Rainier School District, Rainier, Oregon*



### Committee structure

Committees are the most effective—and members are most engaged—when operating with a clear direction. A written charter (see [Appendix 3](#) for a template) can provide a helpful framework for the committee’s work and, if endorsed by leadership, increases credibility and authority.

If your district is large, you may find it effective to form school-level committees that can adapt programming to meet the needs of each school in addition to having a district-level committee that coordinates and oversees the initiative. This allows for a more customized approach and distributes the workload.

#### Employee wellness committee member roles and responsibilities may include:

- Building buy-in
- Leading the planning process
- Forming partnerships
- Coordinating with other school health initiatives
- Modeling healthy behaviors by participating in wellness activities
- Communicating with employees and engaging others in the initiative
- Coordinating and running activities
- Celebrating successes



## Designate a leader

Having a point person or persons to lead the initiative is helpful. A chairperson (or co-chairs) for the employee wellness committee can serve as the lead, or other employees can volunteer to head up the initiative. Some districts provide a stipend to one or more staff members to lead the initiative. A more formal option is to incorporate the role of coordinating the initiative into an employee's job description, such as the wellness coordinator. Depending on the size of your district and scope of the initiative, this could range from a few hours per month to a full-time position. Regardless of the structure, key responsibilities of the leader(s) could include the following:

- Overseeing the employee wellness committee and champions (see below),
- Serving as a liaison to district administration,
- Cultivating and managing external partnerships,
- Leading planning and implementation of the initiative, and
- Managing the budget and identifying new resources (if applicable).

## Engage wellness champions

Establishing a network of wellness champions can increase employee participation and distribute the workload.<sup>30,35</sup> Many districts find having such champions to be helpful.

Wellness champions can provide the following support:

- Educate employees about the importance of wellness,
- Promote activities and offerings,
- Assist with organizing activities and events,
- Maintain program visibility and generate enthusiasm,
- Provide feedback on the needs and interests of their peers, and
- Share ideas and insights on areas for improvement.



**TIP:** Keep wellness champions engaged by communicating with them and involving them in activities on a regular basis, giving them a clear role, and celebrating successes.

When recruiting champions, look for individuals who are excited about employee wellness, persuasive, relatable, and trusted by their peers. Be clear during recruitment about the weekly time commitment and the length of service. It is helpful to provide champions with an initial orientation to their role as well as periodic check-ins and/or small group training sessions to share successes and strategies.

## Chapter resources

### Tools and templates

#### Appendix 3:

- Worksheet: Employee wellness team
- Sample committee charter template

### Other resources

#### *Committee*

- [Form a Steering Committee](#) (University of Massachusetts Lowell) — detailed guidance and tools on worksite wellness committees
- [Governance Structure and Management](#) (Centers for Disease Control and Prevention) — guidance on designating a coordinator and committee
- [School Wellness Committee Toolkit](#) (Alliance for a Healthier Generation) — toolkit for school wellness committees with helpful information and tools that could be adapted to employee wellness
- [Wellness Committee Guide](#) (Anthem) — guidance on establishing an employee wellness committee
- [Wellness Committee Guide](#) (WorkWell North Carolina) — comprehensive guidance on developing a worksite wellness committee
- [Wellness Committee Member Recruitment Emails](#) (Kaiser Permanente) — sample letter to potential committee members
- [Wellness Committee Toolkit](#) (Kaiser Permanente) — toolkit on building a worksite wellness committee

#### *Leaders and Champions*

- [Sample Job Description](#) (Columbus City Schools) — job description for a full-time coordinator overseeing employee and student wellness
- [Sample Well-being Champion Application](#) (Syracuse University) — application to serve as a wellness champion
- [Sample Well-being Champion Responsibilities](#) (University of Denver) — responsibilities and application for wellness champions



## Ch.04 | Gather Information

### Chapter summary

- Gathering information about employee needs and interests, existing programs and supports, district and community resources, and/or employee health status can help guide the development of the initiative.
- Draw on existing resources and tools to collect the most relevant information.

#### FIRST STEPS



Try a short survey to find out what wellness offerings employees are interested in. Example surveys are included in the resources at the end of this chapter.

### What to collect

This chapter outlines several types of information that can help you plan your employee wellness initiative. **Much of this information is already available or can be collected easily using existing resources and tools.** There is no need to gather all of this information—focus on what will be the most helpful. Be sure to secure administrative approval for data collection. The information you collect will also provide a baseline for showing the results of the initiative (see [Chapters 5 and 7](#)).

### Employee needs and interests

Knowing what type of programs employees are interested in and understanding their motivations and barriers will help you develop an initiative that makes employees excited to participate. There are several employee interest surveys listed in the

resources section of this chapter that can be used or adapted as well as a sample communication in [Appendix 4](#). If conducting a survey is not possible, informal interviews or group conversations during staff meetings can provide useful insight.

Regardless of how the information is gathered, potential areas to ask about include the following:

- Level of interest in various wellness topics (see Table 1);
- Knowledge and health behaviors (e.g., current exercise habits) related to wellness topics;
- Preferred times, locations, and formats (e.g., live class, team activity, individual challenge, etc.) for programs; and
- Motivators and barriers (e.g., time and scheduling, physical limitations, affordability) for participating.

**Table 1: Wellness Topics**

- Preventive services
- Chronic disease management
- Weight management
- Safety and injury prevention
- Physical activity
- Nutrition
- Substance use
- Social-emotional health and stress
- Sleep
- Breastfeeding
- Emergency preparedness
- Benefits
- Financial wellness



Surveys should be voluntary and anonymous so that participants feel comfortable being honest. Surveys can be promoted through a variety of methods, including email, flyers, and announcements.

**Existing programs and supports**

Understanding what programs and supports already are in place to improve employee wellness allows you to target any gaps and avoid duplication. Consider the following questions:

- **Employee wellness programs and activities:** What classes, events, awareness campaigns, and other services has the district already implemented?
- **Healthy school environment:** What policies and practices are in place to promote employee wellness, and are they being implemented fully? Do employees feel encouraged to make healthy choices? What facilities are available to support employee wellness (e.g., fitness facilities, healthy vending options)?
- **Benefits design:** Do benefits packages cover a full range of services—including preventive care, mental and behavioral health, employee assistance, and health coaching—at affordable rates? Are employees aware of the available benefits? Can the district expand eligibility for benefits?
- **Student health and wellness initiatives:** What initiatives are in place to advance student health that could be leveraged to support employee wellness?

Districts and schools also are encouraged to complete the brief Employee Wellness and Health Promotion Module of CDC’s School Health Index. Many schools complete the School Health Index on a regular basis, so the information already may be available. The results can provide a helpful snapshot of strengths and areas for improvement.



Another option for assessing existing programs and supports is CDC’s [Worksite Health ScoreCard](#). Though not specifically designed for schools, this detailed assessment might be of interest to those seeking to expand or enhance an existing wellness initiative.

### District and community resources

Understanding what resources are available to support the initiative will help you develop a realistic plan. There are several types of resources to consider.

**Available expertise:** Unlike many other businesses, schools have the advantage of already having nutrition, physical fitness, mental health,

and healthcare professionals onsite who can share their expertise. Other staff with relevant knowledge and skills also may be willing to assist.

**Programs and partners:** There are many different organizations and community groups that might support the initiative. The district or school can engage partners through formal agreements or informal collaboration. When reaching out to potential partners, consider what the district has to offer in return, such as use of facilities before or after school. If working with new partners, it can be helpful to explain the unique opportunities, constraints, and structure of the school environment.

### Table 2: Potential Programs and Partners

**Consider the following potential partners:**

- Local and/or State Health Departments
- Hospitals, health systems, and local providers (physicians, dentists, mental health providers, etc.)
- Health organizations (American Cancer Society, American Lung Association, American Red Cross)
- Local businesses and/or business coalitions
- Fitness centers/programs
- Parks and recreation
- Health coalitions
- Benefits providers
- Parent associations
- Post-secondary education programs

**Partners may be able to provide:**

- Planning and implementation guidance
- Training and support
- Counseling and risk management
- Benefits design assistance
- Health assessments or biometric screenings
- Clinical services such as flu shots
- Health education and resource materials
- Referral resources
- Instructors for classes
- Facilities
- Discounts on programs
- Participation incentives
- Assistance with campaigns or events
- Promotion of the initiative

**Funding:** Consider the following potential funding sources:

- The district or school's budget
- Grants
- State tax credits available to employers for wellness programming
- Fundraisers
- Donated incentives
- A small program fee charged to participants



## Employee health status

Knowing which health risks and conditions are common among employees can help you identify the wellness offerings that will have the greatest impact. The employee wellness committee can obtain this information by reviewing aggregate results of employee health assessments or biometric screenings, health insurance claims data, employee absence and turnover data, and/or community health data sets (which are all de-identified). Districts that are interested in exploring this data can consult the resources at the end of this chapter for guidance.

## Chapter resources

### Tools and templates

[Appendix 4:](#)

- Worksheet: Planning information
- Sample communication to employees
- Employee wellness laws, ethical principles, and other considerations

### Other resources

#### *Employee needs and interests*

- [CAPTURE Employee Health Assessment](#) (CDC)
- [Employee Health Interest Survey](#) (Kaiser Permanente)
- [Employee Level Assessment](#) (CDC)
- [Employee Survey](#) (Anthem)
- [Employee Survey](#) (Hudson Falls Central School District)
- [School Employee Health and Well-being Needs and Interests Survey](#) (OEA Choice Trust)
- [Worksite Wellness Individual Interest Survey](#) (Borrego Springs Unified School District)

- [Worksite Wellness Resource Kit](#) (Wisconsin Department of Health Services) — see Appendix C and D

#### *Existing programs and supports*

- [School Health Index](#) (CDC)
- [Worksite Health Scorecard](#) (CDC)

#### *Employee health status*

- [Behavioral Risk Factors Data Portal](#) (CDC) — information about chronic disease and health behaviors at the national, state, and metropolitan level
- [County Health Rankings](#) (Robert Wood Johnson Foundation) — information about health behaviors broken down by County
- [Healthcare Cost Data](#) (CDC) — detailed guidance on interpreting insurance claims data
- [Health Risk Appraisals at the Worksite: Basics for HRA Decision Making](#) (National Business Coalition on Health) — information on when and how to implement Health Assessments at the worksite



## Ch.05 | Plan for Success

### Chapter summary

- Taking the time to create a plan will make implementation easier.
- Districts and schools can develop either a basic or comprehensive plan depending on their needs.

#### FIRST STEPS



Use the information you have gathered to select one or two offerings from [Appendix 1](#). Then use the template in [Appendix 5](#) to create a basic work plan.

### Choose topic areas

Start the planning process by prioritizing wellness topics (see [Table 1](#) on p. 25) using the information you have gathered (see [Chapter 4](#)). For example, if your employee interest survey shows that staff are interested in improving their diet, data from the district's health insurer indicate that obesity is driving up healthcare costs, and/or the district is exploring healthy vending policies as part of a student health initiative, then nutrition would be a good choice of topics.

Aim to select no more than three topics in a given year. **Starting small and achieving early wins is a great way to generate excitement about the initiative and continue to build support.** It also keeps the workload manageable, helps maintain momentum, and avoids spreading resources too thin.

**TIP:** Choosing topics that have the support of leadership, even if not the highest priority of the committee, can build buy-in that will enable you to expand to other topics in the future.



## Set goals

Many districts find it helpful to set goals for their wellness initiative. Goal statements express what the district hopes to achieve during the next two or three years to improve employee wellness. Goals provide direction and purpose for an initiative. Goals are stated in positive terms and should be meaningful and easily understood. Setting two or three goals is manageable for most districts and schools.

Goals can align with a single wellness topic, such as nutrition, or address more complex issues, such as school climate. Linking with district goals or accountability measures will increase support for the initiative by showing how the initiative will advance the district's priorities.

### Topic area: Nutrition

**Example goal:** By 2021, increase the number of employees reporting that they eat the recommended amount of fruits and vegetables by 20%.

## Select offerings

There are many evidence-based and promising programs, classes, policy changes, and other offerings that districts and schools can implement to improve employee wellness. The tables in Appendix 1 list numerous possibilities, classified into four types:

- **Activity or event:** individual or group classes, challenges, gatherings, or events
- **Benefits design:** insurance coverage, flex time, incentives and reimbursements, employee assistance programs, and other benefits
- **Healthy school environment:** infrastructure, policies, practices, and norms that support healthy behaviors
- **Information and awareness:** awareness campaigns, resources, and educational materials

**TIP:** Working to create a healthy school environment is wide-reaching, cost-effective, and sustainable. For example, implementing a healthy vending policy will have a greater impact than trying to persuade individual employees to avoid unhealthy vending machine snacks.



To select offerings, start with the topics that your committee prioritized. Then, review the ideas listed for those topics in [Appendix 1](#). Consider the following to guide your selection:

- **Potential impact:** Which offerings will have the greatest impact on employee wellness? Which would have additional benefits, such as a positive impact on student health?
- **Available resources:** Which offerings does the district or school have the resources (time, space, funding, expertise, etc.) to implement? Which would be the most cost-effective and/or leverage other resources?
- **Employee needs and interests:** Which offerings align with employee interests and scheduling needs? Which can meet the needs of diverse groups of employees?
- **Ease of implementation:** How difficult is each offering to implement? What policies, programs,

or benefits are already in place that would affect implementation? It's best to balance offerings that will take more effort with others that are less difficult to put into place.



If possible, aim to include several types of offerings. Providing multiple ways to participate will engage more employees.

For example, some may prefer to join a walking group (activity) while others would rather receive reimbursement for a gym membership (benefits design). Combining different types of offerings also provides more support for healthy behaviors. For example, to improve their nutrition, staff may need education on how to make healthy food choices, motivation to do so, and convenient access to healthy options. A combination of nutrition resources, cooking classes, healthy eating challenges, and a healthy vending policy would provide comprehensive support for healthy eating.

## Write objectives

The next task is to develop objectives. Objectives define what the district would like to achieve in the next year (see [Table 3](#) for examples) and provide a roadmap for implementing wellness offerings. If you chose to set goals, your objectives and goals should be clearly linked. Objectives are most helpful if they are SMART: Specific, Measurable, Attainable, Relevant, and Time-bound. Some should be short-term, so they can be accomplished quickly to help build momentum.



**TIP:** To avoid getting overwhelmed, focus on realistic changes and leverage existing resources, such as increasing utilization of benefits that are already in place.



## Determine how to show results

Evaluation identifies what changes are happening as a result of the employee wellness initiative. If you are just getting started with employee wellness, you may wish to bypass this step initially. For those interested in demonstrating results, it is helpful to determine upfront how the initiative will be evaluated so that the necessary information can be collected.

**TIP:** When deciding how to evaluate, think through how you will use the information. Whom will you share the results with? What information will you need to demonstrate the value of the initiative?

When evaluating, consider two different types of information: process and outcome measures.

- **Process measures** look at the implementation of the initiative and provide a great way to identify early achievements. For example, tracking participation will show if attendance is low for any classes, so you can take steps to increase participation or cancel the class.
- **Outcome measures** look at the impact the initiative is having on staff wellness and track progress toward meeting goals. For example, data might show that employee absences fall by 10%.

Examples of process and outcome measures are listed in [Appendix 5](#).

Many districts and schools choose to focus on process measures, particularly when first getting started. Start by determining what data you already can access. For example, your benefits providers or human resources department may be able to share information. Additional guidance on demonstrating results can be found in [Chapter 7](#).

**Table 3: Example Goal, Objectives, and Measures**

<p><b>Goal:</b></p> <p>By 2020, improve the social and emotional health of staff and reduce the number of employees who report feeling moderately to very stressed on many days by 20%.</p> <p><b>Offerings:</b></p> <ul style="list-style-type: none"> <li>• Training on assisting students with social needs</li> <li>• Gratitude boards</li> <li>• Yoga class</li> <li>• Mentorship program</li> </ul> <p><b>Objectives:</b></p> <ul style="list-style-type: none"> <li>• During each professional development day this year, provide resource sheet and 20-minute training on assisting students at risk of or experiencing violence, homelessness, food insecurity, and utility shut-offs (1-2 topics per training).</li> <li>• By November of this school year, implement gratitude boards in each staff lounge.</li> <li>• By January of next year, hold yoga class in each building with at least 10 participants per class.</li> <li>• By June of this year, develop comprehensive plan to re-vamp teacher mentorship program.</li> </ul>	<p><b>Outcome measures:</b></p> <ul style="list-style-type: none"> <li>• % of staff reporting improvements in energy, mood, productivity, and morale</li> <li>• Decrease in % of staff reporting feeling stressed</li> <li>• Decrease in staff absences</li> <li>• Decrease in doctor visits for stress and mental health concerns</li> </ul> <p><b>Process measures:</b></p> <ul style="list-style-type: none"> <li>• # of employees trained, % satisfied with the training</li> <li>• # of posts on gratitude boards</li> <li>• # of employees participating in classes; % of staff satisfied with classes;</li> <li>• Plan developed</li> </ul>
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## Write your plan

A written plan that has buy-in from stakeholders will provide a clear guide and timeline for rolling out the initiative. [Appendix 5](#) has templates for basic and comprehensive plans. Before finalizing the plan, share it with key stakeholders and decision-makers for their input and approval.

**The plan should be a living document that is updated as circumstances change.**



**TIP:** Testimonials from staff who have been positively impacted by the initiative can be used to show outcomes and to increase support and participation.

## Scheduling

When planning the details of the initiative, take into account these scheduling considerations:

- **Varied schedules:** Employees with different types of positions have varied schedules and levels of flexibility during the work day. Offering activities that can be done with students during the school day or individually during break time can help address this barrier.
- **Hectic times of the year:** There are certain times of year when staff are especially busy. Take this into account when scheduling activities and events.
- **Summer break:** Summer break reduces the amount of progress that can be made in a given year. Be sure your plan reflects what can realistically be accomplished.
- **Awareness months, holidays, and milestones:** Consider aligning with key events in the district or broader community. For example, mammograms could be promoted during Breast Cancer Awareness Month, or a staff biking challenge could be held in connection with Bike to School Day.

## Chapter resources

### Tools and templates

[Appendix 5:](#)

- Example measures for demonstrating results
- Basic work plan template
- Comprehensive work plan template

### Other resources

- [Developing a Strategic Plan](#) (Community Tool Box) — step-by-step guidance on developing a comprehensive strategic plan
- [Worksite Wellness Resource Kit](#) (Wisconsin Department of Health Services) — see Appendix I for example basic and detailed budget templates for employee wellness



## Ch.06 | Maximize Your Impact

### Chapter summary

- Ongoing communication helps to promote wellness offerings and maintain visibility of the initiative.
- Multiple strategies can be used during implementation to communicate effectively and to achieve high levels of participation.

#### FIRST STEPS



Consider adding a quarterly employee wellness message to an existing staff newsletter. You can find pre-written articles in the resources at the end of this chapter.

### Communicate

As you begin to implement your employee wellness plan, it is helpful to maintain ongoing communication with employees to maximize engagement. Techniques to increase the impact of communications are outlined below. If your district has communications staff, they may be able to assist with this process.

#### Include key information

When developing communications, be sure to include the key information that employees need to know. While this may seem obvious, it is easy to forget to include details like the room number for a class. Table 4 lists some communications opportunities along with key information to include.

**Table 4: Communication Content**

Purpose	Information to include
<b>Promoting wellness opportunities</b>	<ul style="list-style-type: none"> <li>• <b>What</b> programs, campaigns, classes, or benefits are available, and what policy, practice, or infrastructure changes are taking place.</li> <li>• <b>Who</b> should participate.</li> <li>• <b>Why</b> the issue or topic should matter to employees and the benefits of participating.</li> <li>• <b>How</b> to get involved (e.g., time, location, simple sign-up instructions).</li> </ul>
<b>Sharing information about improving wellness</b>	<ul style="list-style-type: none"> <li>• <b>Why</b> the topic is important and what employees can gain by taking action.</li> <li>• <b>What</b> steps employees can take to act on the information (e.g., if sharing information about heart health, provide specific actions that employees can take to improve their heart health).</li> <li>• <b>References</b> or links to high-quality, evidence-based sources to provide credibility.</li> </ul>
<b>Building awareness and support for your employee wellness initiative</b>	<ul style="list-style-type: none"> <li>• <b>Information</b> that educates staff about the purpose and scope of the initiative.</li> <li>• <b>Highlights and successes</b>, including employee testimonials or evaluation results that demonstrate the benefits of participating in the initiative.</li> <li>• <b>Quotes from district or school leaders</b> to help elevate the profile of the initiative.</li> </ul>

### Appeal to your audience

Tailoring how information is presented—including the tone, context, and evidence used—makes communications more appealing. If possible, use language and information that is meaningful and interesting to employees in your district.

- Use “buzz words” or terms that connect with exciting local initiatives.
- Create positive messages focused on how employees can benefit from participating

in the initiative (e.g. more energy, improved mood). This is more effective than focusing on the negative impact of poor health. Avoid stigmatizing unhealthy behaviors.<sup>36,37</sup>

- Convey a commitment to improving employee wellness for its own sake. School employees tend to be mission-driven and focused on students. It can be effective to appeal to this orientation, but avoid giving the impression that the sole purpose of the initiative is to reduce healthcare costs or benefit students.<sup>22,30</sup>



**TIP:** Regardless of the purpose, make communications concise, straightforward, and engaging. Images, quotes, and bullet points are effective.

## Use multiple formats

Use a variety of communication formats (email, newsletters, websites, morning announcements, presentations, social media, flyers, and bulletin boards) to reach different types of employees. Transportation and facilities staff, for example, spend less time on email and may be more likely to notice a flyer. Personal outreach through champions and employee wellness committee members also can be an effective way to communicate.

## Time your communications

Finding the right timing for communications can increase their impact.

- Avoid sending long or important communications during busy times.
- Send multiple announcements about programs and events. Send the first announcement far enough in advance for potential participants to work it into their schedule, and then send follow-up messages prior to the event.
- The six-week and six-month mark are important times for reinforcing new habits.<sup>38</sup> Communicate at these time periods to encourage sustained behavior changes and/or program participation.



## Use visuals

For extra impact, consider using a logo and color scheme to brand your initiative. This helps increase recognition and makes materials look more attractive. Some districts

have held student competitions to design a logo. Incorporating images makes communications more appealing and easier to read. Graphics often can communicate information more clearly and quickly than text. If using photos, find ones that are realistic and reflect the diversity of employees.

## Boost participation

Keeping staff involved requires ongoing effort. Engaging stakeholders, assessing employee needs and interests, and sending regular communications all increase the likelihood of strong participation. In addition, consider these other strategies:

- **Provide recognition.** Bulletin board displays, certificates of completion, celebrations, or newsletter blurbs to recognize those who have reached their goals or taken part in a program can provide encouragement to participants and inspire others to join.
- **Demonstrate leadership support.** Seeing leaders take part in the initiative gives others permission and encouragement to do the same.
- **Create opportunities for participation during work time.** Studies show that allowing time to engage in wellness activities during the work day is one of the most impactful strategies for improving employee wellness.<sup>39</sup> Engaging in activities with students, such as brief physical activity or meditation breaks, is one way to do this.
- **Provide options.** Offer ways to adapt activities to meet individual needs and interests. For example, a “move more” challenge could allow participants to choose from a range of physical activity options.
- **Make it fun.** Developing healthy habits can be challenging. Offering fun and unique programs and providing opportunities to be social makes the process more enjoyable. Holding team

events, setting up a buddy system, reaching out through wellness champions, or involving students in activities are all effective strategies.

- **Consider offering incentives.** Incentives can take many forms, including merchandise, social events, money, reimbursement for wellness-related costs (e.g. fitness memberships), and special benefits such as “casual Fridays.” Incentives are often used as a strategy for boosting participation, but evidence on their impact is mixed.<sup>26,40</sup> Therefore, districts and schools that cannot afford to provide incentives can feel comfortable relying on other strategies to increase participation. For those interested in providing incentives, [Appendix 6](#) lists some “Do’s and Don’ts.”
- **Connect to personal motivations.** Employees will sustain healthy behaviors not because of external rewards, but because better health allows them to do more of the things they want to do. Help staff tap into their own reasons for improving wellness and use that to motivate change.

- **Make it automatic.** Changes to create a healthier school environment can bypass the need to recruit participants altogether. For example, if unhealthy foods are eliminated from staff meetings, staff will automatically choose healthier options during those times.

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**TIP:** Don’t forget the power of personal outreach. Building relationships increases buy-in and participation, and forming connections relieves stress and fosters well-being. *Example:* Hold a “bring a buddy” campaign and ask employees who are already participating in wellness programming to bring a colleague who hasn’t yet participated.

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## Real-world success: Mesquite Independent School District Mesquite, Texas

**Location:** Suburban **Approximate # of staff:** 5,000 **Approximate # of students:** 41,000 **Buildings:** 65  
**Student demographics:** Diverse student population with 56% Hispanic, 25% African American, 15% White, 75% economically disadvantaged. **Annual employee wellness budget:** \$1.60 per employee taken from district budget. **Employee wellness staffing:** A teacher in the district receives a \$5,000 stipend to serve as Wellness Facilitator. The Health Services Director also assists as needed.

Mesquite Independent School District (MISD) has been working to improve the wellness of its employees for 25 years. The goal of the district's wellness initiative is to support employees' physical and mental health, improve staff performance, and decrease absenteeism. MISD offers numerous wellness opportunities, including weekly exercise classes, flu shot clinics, and a variety of health screenings. The district has worked to create a healthier school environment, such as providing nutritious snacks during professional development meetings. A unique offering is a centrally-located employee health center with a pharmacy that makes it convenient for employees to access preventive and sick care.

MISD uses multiple strategies to boost participation in the wellness initiative. The district schedules classes at times and locations that are easily accessible. The initiative includes team activities to make wellness fun and social as well as themed challenges that use competition to motivate employees. The district holds an annual "principal pedometer challenge," in which principals log their step count, to demonstrate leadership support. The visibility of

the challenge events allows employees to model healthy behaviors for students, and students enjoy encouraging the staff. The district offers recognition and incentives such as banners and individual prizes for winning teams. Individual campus administrators have the option of implementing "blue jeans days" for employees who participate in activities like a before- or after-school walking club.

MISD uses a variety of formats to communicate about programs and provide information about the importance of wellness, including flyers, website posts, emails, and a monthly wellness magazine. Each building has an employee wellness representative who helps with communication and promotes participation. The representatives also gather feedback from employees to help inform future programs.

**Advice from MISD: It is absolutely possible to support employee wellness with limited funding. Try YouTube videos for exercise classes or fitness apps that employees can put on their phones and do as a group. Start with simple activities in one school and spread from there.**

## Chapter resources

### Tools and templates

#### [Appendix 6:](#)

- Worksheet: Communications outline
- Worksheet: Participation strategies
- Offering incentives: Do's and don'ts

### Other resources

- [Build a Wellness Newsletter](#) (Anthem) — tool for compiling pre-written articles into a newsletter
- [Developing a Plan for Communications](#) (Community Tool Box) — guidance and resources on developing a communications plan
- [Guidance for a Reasonably Designed, Employer-Sponsored Wellness Program Using Outcomes-Based Incentives](#) (Consensus Statement) — key considerations for designing incentive structure
- [Gateway to Health Communication and Social Marketing Practice](#) (CDC) — guidance on developing effective communications
- [Healthy Hints](#) (Anthem) — weekly healthy hints with graphics that can be used in newsletters, social media, or websites
- [Monthly Health Topics](#) (Kaiser Permanente) — a collection of monthly topics with supporting emails, flyers, and posters that are also available in Spanish
- [National Health Observance Toolkits](#) (healthfinder.gov) — toolkits for 15 different health observances with sample newsletter and social media announcements
- [Sample Employee Wellness Newsletter](#) (Columbus City Schools) — example of a district newsletter
- [School Employee Well-being Resource Center](#) (Kaiser Permanente) — resources including various posters and flyers
- [Tips for Writing a School Employee Wellness Newsletter](#) (OEA Choice Trust) — ideas for newsletter layout and content
- [Wellness Calendar](#) (Anthem) — collection of monthly topics with newsletter articles



## Ch.07 | Demonstrate Results

### Chapter summary

- Districts and schools interested in demonstrating the results of their initiative have multiple options, many of which can be done easily and efficiently.
- Sharing results can increase support for future employee wellness offerings.

#### FIRST STEPS



Consider an annual satisfaction survey about your wellness offerings. An example can be found in the resources at the end of this chapter.

### Collect data

Evaluation does not need to be complicated or time-intensive. There are simple ways to gather information to help demonstrate the value of your initiative. There should be a purpose behind data collection. Collect the information that you need, not information that is simply nice to know.

[Chapter 5](#) provided a brief introduction to two types of information that can be collected to demonstrate the results of an initiative—process and outcome measures. Process measures, which look at how well the initiative is being implemented, are typically reviewed on a regular basis. High levels of participation and satisfaction as well as changes made to create a healthy school environment are all important accomplishments.

It takes longer to see changes in outcomes, so data from outcome measures is typically reviewed every six to 18 months, depending on how the information is being used. Positive changes in knowledge or skills indicates that the initiative is supporting wellness. Improvements in health behaviors demonstrate that the initiative is leading employees to make healthier choices, which ultimately will improve their health. Positive changes in absences, insurance claims, biomarkers (e.g., blood pressure and cholesterol levels), or other direct measures of wellness provide compelling evidence of the value of the initiative.

**TIP:** Some districts have individuals with expertise in data analysis, such as members of a district evaluation team, who can provide assistance. Those interested in a more comprehensive evaluation may also be able to get support from partners such as benefits providers, a local public health department, or a university.



Most data will be easy to analyze. Examples include:

- Calculating the percentage of employees participating in the initiative,
- Calculating the percentage of participants in a class with increased knowledge and skills,
- Tallying the total number of minutes of physical activity logged by employees, or
- Determining the percent reduction in employee absences.

The table of evaluation measures in [Appendix 5](#) provides potential measures and suggestions for collecting and analyzing this data. Note that quotes and testimonials from employees are easy ways to show the impact of the initiative.

## Share findings

Sharing successes with district and school leadership and other key stakeholders increases the visibility of the initiative, demonstrates value, and helps make the case for ongoing resources. Results can be disseminated in a variety of ways, including reports, presentations, infographics, success stories, data dashboards, and newsletter articles. Use several formats to reach multiple audiences.

To maximize the impact when sharing results, consider the following tips:

- **Determine the best format and content for your intended audience.** A brief summary may work better for employees and superintendents, while human resources staff may want a more detailed report. Similarly, testimonials may be more meaningful for some audiences, while data on cost savings will resonate with others.
- **Use visuals.** Use charts, graphs, and images to display the information at a glance.
- **Translate results into meaningful terms.** To the extent possible, use real-life units and comparisons. For example, rather than just reporting the percent change in teacher absences, you could state that students, on average, received an additional week of instruction from their teacher.
- **Align with district and school priorities.** Demonstrate how the results link with or help advance other key metrics in the district.



**TIP:** Celebrate all successes, big or small!



## Real-world success: Columbus City Schools

### Columbus, Ohio

**Location:** Urban **Approximate # of staff:** 8,000 **Approximate # of students:** 51,500 **Buildings:** 132

**Student demographics:** Diverse population; one in six students speak a primary language other than English. The district meets community eligibility criteria for free school meals. **Source of Funds:** The district's Board of Education allocates funds from the employee self-insurance fund. **Employee wellness**

**staffing:** Wellness Coordinator with 80% of time dedicated to employee wellness and a part-time secretary.

Started in 2005, Columbus City Schools' (CCS) Healthy Bodies, Active Minds Wellness Initiative aims to support student success by creating and fostering a culture of wellness for students, staff, and the community. The goals of the employee wellness component, known as the CCS Staff Wellness Initiative, are to contain health care costs, attract and retain employees, reduce absenteeism, improve school climate, and support employee health. The initiative has grown to include a broad range of offerings aligned with eight different dimensions of wellness.

Evaluation has been key to the success of the initiative. The CCS Staff Wellness Initiative collects process data through a customized online wellness portal developed by a vendor. The portal allows the district to track program participation and retrieve data by demographics. CCS also collects data through on-site reviews of program quality and participant satisfaction surveys. The Wellness Coordinator reviews the data monthly to determine trends and make real-time improvements. For example, if a class has low enrollment, the Coordinator will take steps to boost participation or will cancel the class. This maximizes the employee wellness budget. CCS also uses the data to help ensure that programming is equitable across locations

and types of positions. The Coordinator prepares monthly and annual reports and shares them with HR staff and union representatives.

CCS collects outcome data as well. CCS gets a snapshot of health behaviors and overall employee health by reviewing claims data and benefits usage information from benefits providers. This helps the district make decisions about health plan structure, develop programs to increase benefits utilization, and address priority health concerns. CCS also tracks total pounds lost through the Weight Watchers program each month. The Wellness Coordinator has collected multiple testimonials from employees about the positive impact of the initiative. The district plans to conduct additional outcome evaluation in the future, such as analyzing the association between program participation and indicators such as morale and absenteeism, which will further demonstrate the value of the initiative and guide continued improvement.

**Advice from CCS: When planning your initiative, pay equal attention to how you will measure success. Think about what data is important from an operational standpoint and for demonstrating how the initiative supports your district's goals.**

## Chapter resources

### Tools and templates

[Appendix 7](#):

- [Worksheet: Data collection and sharing](#)

See also *Example evaluation measures* in [Appendix 5](#)

### Other resources

#### General evaluation guidance

- [Evaluation Resources](#) (CDC) — framework, guidebook, and other tools to assist with evaluation
- [Introduction to Evaluation](#) (Community Tool Box) — detailed tools and guidance on planning and implementing evaluation
- [Manager’s Guide to Evaluation](#) (Better Evaluation) — website with extensive guidance and resources to support evaluation

#### Sample surveys

- [Employee Feedback Survey](#) (Michigan Healthy Worksites) — survey to collect feedback on a class, activity, or other event
- [Evaluation Tools](#) (Region of Waterloo Public Health) — sample survey questions for several types of programs
- [Sample Annual Wellness Program Survey](#) (Columbus City Schools) — example survey to collect feedback on school employee wellness programming

### Sharing findings

- [Evaluation Reporting Guide](#) (Kauffman Foundation) — tips on formatting evaluation reports
- [Sample Annual Programming Report](#) (Columbus City Schools) — example annual evaluation report
- [Sample Monthly Programming Report](#) (Columbus City Schools) — example monthly evaluation report
- [Success Stories Made Easier](#) (CDC) — application for writing success stories

### Other

- [Cost Calculators](#) (ESI Group) — 30 different calculators to help estimate costs
- [Healthcare Cost Data](#) (CDC) — detailed guidance on interpreting insurance claims data



## Ch.08 | Maintain Momentum

### Chapter summary

- Following the steps described throughout this guide will position the initiative for sustained success.
- Additional ways to maintain momentum are listed in this chapter.

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“Our employee wellness initiative has allowed us to build a culture in which staff feel valued, cared for, and connected with their colleagues. Because our employees feel good at work, we have better staff retention, attendance, and productivity.”

— Michael Carter, Superintendent, Rainier School District, Rainier, Oregon

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**Stay energized.** Continuously reflecting on and celebrating accomplishments, sharing leadership, distributing the workload, and periodically recruiting new committee members and champions all help maintain engagement in and excitement about the wellness initiative.

**Keep it fresh.** Over time, employee participation can wane as the excitement of new programs wears off. Repeat successful activities if there is still a need, but include a few novel programs or put a new twist on old favorites to help maintain interest.

**Change the environment.** Once in place, changes that create a healthy school environment run on their own and continue to provide positive benefits, even if other parts of the initiative do not receive ongoing resources. For example, a healthy meetings policy will continue to benefit staff even

if there are no new employee wellness programs, whereas the benefits of a fitness class end once the session is over.

**Don't reinvent the wheel.** Whenever possible, use resources that already have been developed, such as pre-written newsletter articles and wellness campaign materials. Consider documenting procedures for repeat activities, such as an annual wellness fair or campaign, and maintain a shared file that everyone on the employee wellness committee can access that includes important contacts, the work plan, communication materials, and other documents.



**Look to the future.** The employee wellness committee may wish to develop a five-year plan for the initiative. This provides a longer-term vision to work toward and allows the committee to map out and seek the resources needed to continue growing the initiative.

### Chapter resources

- [Sustainability Framework](#) (Healthy Places by Design) — framework to assist with moving along a continuum towards sustainability
- [Sustaining the Work or Initiative](#) (Community Toolbox) — resources and information on planning for sustainability

# Appendix 1 POTENTIAL WELLNESS OFFERINGS

The tables in this section provide ideas for improving employee wellness. Select offerings that align with the needs, priorities, and resources of your district or school. Not all of these ideas will be feasible or appropriate for every district.

## LEGEND

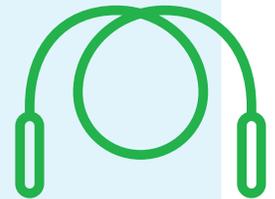
**A- Activity or event:** individual or group classes, challenges, gatherings, or events

**BD- Benefits design:** insurance coverage, flex time, incentives and reimbursements, employee assistance programs, and other benefits

**HSE- Healthy school environment:** infrastructure, policies, practices, and norms that support healthy behaviors

**I- Information and awareness:** awareness campaigns and provision of resources and educational materials

\* Starred offerings directly impact student health as well as employee health.



## Preventive services

Preventive services include vaccinations and screenings. Vaccinations prevent the development of illness. Screenings allow for early identification of concerns so that more serious disease can be avoided. When combined with education, referrals, and other supports for those who screen positive, screening is an effective way to improve employee health.<sup>41</sup>

Offering	Type	Resources
Offer and promote onsite flu shots *	A BD	<ul style="list-style-type: none"> <li>• Check with your benefits providers for resources and coverage information</li> <li>• <a href="#">Flu Communications Resources for Businesses and Employers</a> (CDC)</li> <li>• <a href="#">Flu Facts Flier</a> (Kaiser Permanente)</li> <li>• <a href="#">Influenza</a> (CDC)</li> </ul>
Offer health assessments	A BD	<ul style="list-style-type: none"> <li>• Check with your benefits providers for resources and coverage information</li> </ul>

Preventive services (continued)

Offering	Type	Resources
Offer onsite biometric health screenings (Body Mass Index, blood pressure, cholesterol, diabetes)	A BD	<ul style="list-style-type: none"> <li>• Check with your benefits providers for resources and coverage information</li> <li>• <a href="#">Biometric Health Screenings for Employers</a> (HERO)</li> </ul>
Offer onsite cancer screenings (e.g., mammography van)	A BD	<ul style="list-style-type: none"> <li>• Check with your benefits providers for resources and coverage information</li> <li>• <a href="#">Investing in Health Workplace Guide</a> (Partnership for Prevention)</li> </ul>
Offer onsite depression screening	A BD	<ul style="list-style-type: none"> <li>• Check with your benefits providers for resources and coverage information</li> <li>• <a href="#">Right Direction</a> (Center for Workplace Mental Health)</li> </ul>
Hold a screening or check-up challenge	A	<ul style="list-style-type: none"> <li>• <a href="#">Preventive Exams Healthie Challenge</a> (Anthem)</li> </ul>
Run screening promotion campaigns to encourage participation in onsite screenings or motivate employees to get screened on their own	I	<ul style="list-style-type: none"> <li>• <a href="#">Health Kits</a> (Anthem)</li> <li>• <a href="#">Investing in Health Workplace Guide</a> (Partnership for Prevention)</li> <li>• <a href="#">Know Your Lemons</a> (Worldwide Breast Cancer)</li> <li>• <a href="#">Preventive Exams Healthie Challenge</a> (Anthem)</li> <li>• <a href="#">Screen for Life</a> (CDC)</li> <li>• <a href="#">Stay Healthy</a> (ACS)</li> </ul>
Provide full insurance coverage for preventive services	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>

**Chronic disease management**

Disease management programs focus on educating and empowering employees to take action to improve their health and avoid further negative consequences from their disease. Research shows that chronic disease management is an effective component of an employee wellness initiative.<sup>20</sup> With nearly half of adults affected by chronic disease,<sup>3</sup> these programs can potentially impact large numbers of employees.

Offering	Type	Resources
Offer condition-specific classes or support groups (e.g., diabetes management class)	A	<ul style="list-style-type: none"> <li>• <a href="#">Breathe Well Live Well</a> (ALA)</li> <li>• <a href="#">Diabetes Lifestyle Change Program</a> (CDC)</li> <li>• <a href="#">Find Programs and Workshops</a> (Evidence-Based Leadership Council)</li> </ul>
Offer individualized chronic disease management counseling (by phone or in-person)	A	<ul style="list-style-type: none"> <li>• Check with your benefits providers for resources and coverage information</li> </ul>
Provide chronic disease management resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">Conditions</a> (AHA)</li> <li>• <a href="#">Diabetes Patient Education</a> (NDEI)</li> <li>• <a href="#">Educational Materials</a> (CDC)</li> <li>• <a href="#">Employee Education</a> (Anthem)</li> <li>• <a href="#">Health Kits</a> (Anthem)</li> <li>• <a href="#">High Blood Pressure</a> (CDC)</li> <li>• <a href="#">Living with Diabetes</a> (CDC)</li> <li>• <a href="#">Living with Diabetes</a> (ADA)</li> <li>• <a href="#">Lung Health and Diseases</a> (ALA)</li> <li>• <a href="#">National Diabetes Prevention Program</a> (CDC)</li> <li>• <a href="#">Online Catalog</a> (NHLBI)</li> <li>• <a href="#">Self-management Education</a> (CDC)</li> </ul>
Provide insurance coverage for disease management (counseling, classes, treatments, and supplies)	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>

## Weight management

See physical activity and nutrition offerings.

## Safety and injury prevention

A safe school environment protects staff and students from injury and illness. A clean, well-lit, and well-ventilated building also impacts the productivity, attendance, performance, and morale of students and staff.<sup>42,43</sup>

Offering	Type	Resources
Ensure proper lighting *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Best Practices Manual</a> (Collaborative for High Performance Schools)</li> <li>• <a href="#">Design and Construction for a Healthy School Environment</a> (EPA)</li> <li>• <a href="#">Healthy Buildings</a> (Harvard T.H. Chan School of Public Health)</li> <li>• <a href="#">Schools: Healthy Buildings</a> (EPA)</li> </ul>
Institute an air quality management program *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Creating Healthy Indoor Air Quality in Schools</a> (EPA)</li> <li>• <a href="#">Healthy Schools, Healthy Kids</a> (EPA)</li> </ul>
Provide ergonomic work stations	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Computer Workstations E-tool</a> (OSHA)</li> <li>• <a href="#">Ergonomics</a> (OSHA)</li> <li>• <a href="#">Ergonomics and Musculoskeletal Disorders</a> (NIOSH)</li> <li>• <a href="#">Workspace Evaluation</a> (WorkWell NC)</li> </ul>
Implement cleaning guidelines *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Green Clean Schools</a> (Healthy Schools Campaign)</li> <li>• <a href="#">Routine Cleaning and Maintenance for a Healthy School Environment</a> (EPA)</li> </ul>
Conduct safety checks/ audits *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Total Worker Health</a> (CDC)</li> </ul>
Provide professional development on injury prevention	A	<ul style="list-style-type: none"> <li>• <a href="#">Recommended Practices</a> (OSHA)</li> </ul>
Provide safety and injury prevention resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">Recommended Practices</a> (OSHA)</li> <li>• <a href="#">Total Worker Health</a> (CDC)</li> </ul>

**Physical activity**

Physical activity is key to maintaining cardiovascular health and a healthy weight. It is also vital to brain and immune health, promotes focus and improved productivity, improves mood and sleep, and relieves stress.<sup>44</sup> Seeing school staff engage in physical activity encourages students to do the same. Offering a variety of ways to be active allows employees to find something that works with their schedule, interests, and fitness level.

Offering	Type	Resources
Post signage to encourage use of stairs *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Move More Workbook</a> (WorkWell NC)</li> </ul>
Mark indoor (hallway) and outdoor walking routes and/or fitness courses *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Move More Workbook</a> (WorkWell NC)</li> <li>• <a href="#">Walking for Workforce Health Toolkit</a> (Kaiser Permanente)</li> </ul>
Implement community use policy *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Breaking Physical Activity Barriers Through Open Community Use</a> (South Carolina Department of Health and Environmental Control)</li> </ul>
Offer active desks (e.g. standing desk, balance ball, wobble stool)	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide exercise equipment (hand weights, bands, mat, exercise videos) in staff lounges	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide staff changing facilities and showers	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide onsite exercise facilities open for use during and after school day	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Offer support or incentives for active commuting or parking in remote lot	HSE	<ul style="list-style-type: none"> <li>• <a href="#">A Beginner’s Guide to Biking to Work</a> (New York Times)</li> <li>• <a href="#">Get Ready to Ride</a> (Active Transportation Alliance)</li> <li>• <a href="#">Move More Workbook</a> (WorkWell NC)</li> </ul>
Institute a movement-friendly dress code	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Hold active staff meetings (standing or walking meetings; incorporate physical activity breaks)	HSE A	<ul style="list-style-type: none"> <li>• <a href="#">Healthy Meetings Guide</a> (Kaiser Permanente)</li> <li>• <a href="#">Move More Workbook</a> (WorkWell NC)</li> </ul>

Physical activity (continued)

Offering	Type	Resources
Build in physical activity breaks for staff during school day (can be done along with students) *	HSE A	<ul style="list-style-type: none"> <li>• <a href="#">Brain Breaks, Instant Recess, and Energizers</a> (AFHK)</li> <li>• <a href="#">Classroom Energizers</a> (AFHK)</li> <li>• <a href="#">Energizers for Schools</a> (Eat Smart Move More NC)</li> <li>• <a href="#">Staff Fitness Breaks</a> (Alliance for a Healthier Generation)</li> </ul>
Offer onsite fitness classes	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Hold exercise challenges (e.g. steps challenge, exercise minutes challenge)	A	<ul style="list-style-type: none"> <li>• <a href="#">7 Simple, Fun Challenges to Start at Work</a> (Office of Disease Prevention and Health Promotion)</li> <li>• <a href="#">Move More Workbook</a> (WorkWell NC)</li> <li>• <a href="#">Workplace Fitness Challenge Ideas</a> (Marathon Health)</li> <li>• <a href="#">Workplace Wellness Challenges</a> (Corporate Wellness Magazine)</li> </ul>
Form exercise clubs or employee sports teams (e.g. lunchtime walkers club, soccer club)	A	<ul style="list-style-type: none"> <li>• <a href="#">Walking for Workforce Health Toolkit</a> (Kaiser Permanente)</li> </ul>
Sponsor a healthy lifestyle club	A	<ul style="list-style-type: none"> <li>• <a href="#">Maintain Don't Gain Toolkit</a> (Kaiser Permanente)</li> </ul>
Offer onsite physical fitness assessments	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Promote local fitness opportunities (e.g., 5ks, clubs, gyms)	I	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide physical activity resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">Build Physical Activity</a> (Kaiser Permanente Thriving Schools)</li> <li>• <a href="#">Exercise and Fitness</a> (Anthem)</li> <li>• <a href="#">Get Moving</a> (AHA)</li> <li>• <a href="#">Health Kits</a> (Anthem)</li> <li>• <a href="#">Investing in Health Workplace Guide</a> (Partnership for Prevention)</li> <li>• <a href="#">Move More Workbook</a> (WorkWell NC)</li> <li>• <a href="#">Online Catalog</a> (NHLBI)</li> <li>• <a href="#">Physical Activity</a> (CDC)</li> <li>• <a href="#">Physical Activity Resources</a> (PCFSN)</li> </ul>
Allow time during the contracted work day to be used for physical activity	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Offer subsidized fitness memberships	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>

## Nutrition

Good nutrition supports all aspects of health. A healthy diet reduces the risk of obesity, cancer, and heart disease<sup>45</sup> and has been shown to improve happiness and emotional wellness.<sup>46</sup> Seeing staff make healthy food choices encourages students to do the same.

Offering	Type	Resources
Implement a nutrition policy for all foods sold on campus (if not currently part of wellness policy) *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Eat Smart Workbook</a> (WorkWell NC)</li> <li>• <a href="#">Financial Implications of Healthy Vending</a> (AHA)</li> <li>• <a href="#">Healthy Eating at Work Food Policy Toolkit</a> (Kaiser Permanente)</li> <li>• <a href="#">Healthy Nutrition Guidelines</a> (WA SDOH)</li> <li>• <a href="#">Healthy Workplace Food and Beverage Toolkit</a> (AHA)</li> <li>• <a href="#">Model Vending Standards</a> (NANA)</li> <li>• <a href="#">Recommended Nutrition Standards for Procurement of Foods and Beverages Offered in the Workplace</a> (AHA)</li> </ul>
Use food labeling, nutrition information, and signage to promote nutritious food choices *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Choose a Better Snack</a> (Eat Smart Move More NC)</li> <li>• <a href="#">Cafeteria Menu Labeling</a> (Kaiser Permanente)</li> <li>• <a href="#">Posters and Signs</a> (Chef Ann Foundation)</li> </ul>
Offer discounts on healthier foods and beverages for staff	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide food preparation facilities (e.g. fridge and microwave in staff lounges)	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Institute a healthy staff meeting policy	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Eat Smart Workbook</a> (WorkWell NC)</li> <li>• <a href="#">Healthy Meetings</a> (NANA)</li> <li>• <a href="#">Healthy Nutrition Guidelines</a> (WA SDOH)</li> </ul>
Provide access to drinking water *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Healthy Schools: Water Access</a> (CDC)</li> </ul>
Sponsor an onsite farmers' market *	HSE A	<ul style="list-style-type: none"> <li>• <a href="#">How to Run a Farmers' Market</a> (Mass.gov)</li> <li>• <a href="#">Oakland Fresh Schools Farmers' Markets</a> (Oakland Public Schools)</li> <li>• <a href="#">Worksite Farmers' Market How-to Guide</a> (Hap)</li> </ul>
Create a school garden *	HSE A	<ul style="list-style-type: none"> <li>• <a href="#">Resource Library</a> (Edible Schoolyard Project)</li> <li>• <a href="#">School Gardens</a> (Growing Minds)</li> <li>• <a href="#">Starting a School Garden Program</a> (Kids Gardening)</li> </ul>

**Nutrition (continued)**

Offering	Type	Resources
Offer healthy cooking or nutrition classes	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Conduct taste testings	A	<ul style="list-style-type: none"> <li>• <a href="#">Community Taste Test Event</a> (Fuel Up to Play 60)</li> </ul>
Hold healthy potlucks	A	<ul style="list-style-type: none"> <li>• <a href="#">Healthy Potluck Sign-up</a> (Alliance for a Healthier Generation)</li> <li>• <a href="#">Salad Potluck</a> (Care2)</li> </ul>
Hold nutrition challenges (e.g., water challenge, fruit and vegetable challenge, low sugar challenge)	A	<ul style="list-style-type: none"> <li>• <a href="#">Worksite Challenges</a> (Missouri Department of Health)</li> </ul>
Offer onsite healthy eating clubs or programs	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide nutrition resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">eatright.org</a> (Academy of Nutrition and Dietetics)</li> <li>• <a href="#">Eat Healthy</a> (Anthem)</li> <li>• <a href="#">Eat Smart Workbook</a> (WorkWell NC)</li> <li>• <a href="#">Health Kits</a> (Anthem)</li> <li>• <a href="#">Healthy Eating</a> (AHA)</li> <li>• <a href="#">Healthy Weight</a> (CDC)</li> <li>• <a href="#">Online Catalog</a> (NHLBI)</li> <li>• <a href="#">Investing in Health Workplace Guide</a> (Partnership for Prevention)</li> <li>• <a href="#">Nutrition Resources</a> (PCFSN)</li> <li>• <a href="#">Resource Center</a> (Kaiser Permanente)</li> </ul>
Provide subsidies for weight loss programs (e.g., Weight Watchers)	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide insurance coverage for nutrition counseling and weight management	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>

**Substance use**

Substance use can negatively impact productivity and performance, cause serious health problems, and create an unsafe climate for students and other staff.<sup>47</sup>

Offering	Type	Resources
Institute a substance free campus policy *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Develop a Policy</a> (SAMHSA)</li> <li>• <a href="#">Investing in Health Workplace Guide</a> (Partnership for Prevention)</li> </ul>
Offer onsite support groups	A	<ul style="list-style-type: none"> <li>• <a href="#">Provide Support</a> (SAMHSA)</li> </ul>
Run a tobacco cessation campaign	A	<ul style="list-style-type: none"> <li>• <a href="#">Great American Smokeout</a> (ACS)</li> <li>• <a href="#">Quit for Life</a> (ACS)</li> <li>• <a href="#">Quit Smoking</a> (CDC)</li> </ul>
Run a substance use awareness campaign	I	<ul style="list-style-type: none"> <li>• <a href="#">National Prevention Week</a> (SAMHSA)</li> <li>• <a href="#">National Recovery Month</a> (SAMHSA)</li> </ul>
Educate employees on signs of substance use disorders	I	<ul style="list-style-type: none"> <li>• <a href="#">Provide Education and Training</a> (SAMHSA)</li> <li>• <a href="#">Supervisor Training</a> (SAMHSA)</li> </ul>
Provide substance use resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">Online Catalog</a> (NHLBI)</li> <li>• <a href="#">Resource Center</a> (Kaiser Permanente)</li> <li>• <a href="#">Smokefree.gov</a> (USDHHS)</li> </ul>
Provide coverage for tobacco cessation treatment (medication, counseling, nicotine replacement therapy)	BD	<ul style="list-style-type: none"> <li>• <a href="#">Investing in Health Workplace Guide</a> (Partnership for Prevention)</li> </ul>
Provide coverage for addiction and recovery services	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Offer an employee assistance program	BD	<ul style="list-style-type: none"> <li>• <a href="#">Provide Support</a> (SAMHSA)</li> </ul>

## Social-emotional health and stress

Employees need to be emotionally healthy in order to be fully engaged and present with students and to model self-regulation and social-emotional skills.<sup>48</sup> Depression and stress impact productivity,<sup>49</sup> increase absences, and have a range of negative impacts on physical health.<sup>6</sup> Stress and mental health issues are common among school employees, with half of teachers feeling under great stress at least several days a week.<sup>10</sup> It is particularly important that school staff in districts using a trauma-informed approach or serving high-needs populations receive training and support so they can avoid compassion fatigue, vicarious trauma, and/or triggering of their own past traumas.<sup>50</sup>

See also physical activity, substance use, finance, chronic disease management, and sleep offerings, as those topics also have a direct impact on emotional well-being.

Offering	Type	Resources
Increase staffing levels	HSE	• N/A
Restrict email use outside of work hours	HSE	• N/A
Implement policies and culture that support work-life balance	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Center for Work and Family</a> (Boston College)</li> <li>• <a href="#">Family-friendly Workplace Toolkit</a> (CDPHE)</li> </ul>
Develop partnerships to address urgent student needs to reduce stress on school staff *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Community Outreach</a> (Center for Mental Health in Schools)</li> <li>• <a href="#">How to Start a Community School</a> (Coalition for Community Schools)</li> </ul>
Create inviting staff lounges	HSE	• <a href="#">Healthier Break Room</a> (Kaiser Permanente Thriving Schools)
Provide space for relaxation or meditation breaks	HSE	• N/A
Provide passes that allow teachers to call for someone to cover their class for 15 minutes if they need a break	HSE	• N/A
Incorporate mindfulness meditation breaks for staff and students during the school day *	HSE A	<ul style="list-style-type: none"> <li>• <a href="#">Center for Mindfulness</a> (UMass Medical School)</li> <li>• <a href="#">Mindfulness Resources</a> (ASCD)</li> </ul>
Include employees in decision-making about workplace issues	HSE A	• N/A
Recognize staff contributions and achievements	HSE A	• <a href="#">Recognize the Stars on Your Staff</a> (Education World)

Social-emotional health and stress (continued)

Offering	Type	Resources
Institute gratitude program	A	<ul style="list-style-type: none"> <li>• <a href="#">The Benefits of Practicing Gratitude</a> (OEA Choice Trust)</li> </ul>
Offer 10-minute chair massages	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Hold social events (e.g., potluck lunches)	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Put up a laughter board	A	<ul style="list-style-type: none"> <li>• Check Pinterest for ideas</li> </ul>
Offer mindfulness meditation, stress management, yoga, or mental health classes	A	<ul style="list-style-type: none"> <li>• <a href="#">Center for Mindfulness</a> (University of California San Diego Health)</li> <li>• <a href="#">Mindfulness Awareness Research Center</a> (University of California Los Angeles)</li> </ul>
Hold 5-minute mindfulness conference calls	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Institute a mentorship program or buddy system for staff	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Offer support groups	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide professional development on social-emotional skills, trauma-informed approaches, and resiliency	A	<ul style="list-style-type: none"> <li>• <a href="#">Are You at Risk for Secondary Traumatic Stress?</a> (Edutopia)</li> <li>• <a href="#">Supporting the Staff at a Trauma-Informed School</a> (Treatment and Services Adaptation Center)</li> <li>• <a href="#">Supporting the Whole Teacher</a> (The Aspen Institute)</li> <li>• <a href="#">Trauma Sensitive Schools Learning Modules</a> (Wisconsin Department of Public Instruction)</li> </ul>
Provide professional development on recognizing and supporting employees in mental distress	A	<ul style="list-style-type: none"> <li>• <a href="#">ICU Program</a> (Center for Workplace Mental Health)</li> <li>• <a href="#">Mental Health First Aid</a> (National Council for Behavioral Health)</li> <li>• <a href="#">Organizational Secondary Traumatic Stress</a> (NCTSN)</li> <li>• <a href="#">Secondary Trauma: Guidance for Supervisors and Administrators</a> (NCTSN)</li> </ul>

Social-emotional health and stress (continued)

Offering	Type	Resources
Provide stress management and mental health resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">Finding Balance (Stress Management) Toolkit</a> (Kaiser Permanente)</li> <li>• <a href="#">Find Help and Treatment</a> (SAMHSA)</li> <li>• <a href="#">Health Kits</a> (Anthem)</li> <li>• <a href="#">National Suicide Prevention Lifeline</a> (SAHMSA)</li> <li>• <a href="#">Resource Center</a> (Kaiser Permanente)</li> <li>• <a href="#">Right Direction</a> (Center for Workplace Mental Health)</li> <li>• <a href="#">Secondary Traumatic Stress and Self-care Packet</a> (National Center on Safe Supportive Learning Environments)</li> </ul>
Offer an employee assistance program with access to resources, referrals, and counseling	BD	<ul style="list-style-type: none"> <li>• <a href="#">Employee Assistance Programs</a> (Center for Workplace Mental Health)</li> </ul>
Offer telephone or telemedicine counseling	BD	<ul style="list-style-type: none"> <li>• Check with your benefits providers for resources and coverage information</li> </ul>
Provide coverage for mental health services	BD	<ul style="list-style-type: none"> <li>• <a href="#">Mental Health Benefits</a> (NCSL)</li> </ul>

Sleep

Insufficient sleep impairs decision-making and productivity,<sup>51</sup> is linked to chronic diseases such as obesity and cardiovascular disease,<sup>52</sup> and increases absences and healthcare costs.<sup>53</sup>

Offering	Type	Resources
Increase natural light in workspaces *	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Restrict email use outside of work hours	HSE	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Offer sleep coaching	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Offer sleep hygiene classes	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Hold a sleep challenge	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide sleep resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">Rest and Revive Toolkit</a> (Kaiser Permanente)</li> <li>• <a href="#">Sleep.org</a> (National Sleep Foundation)</li> <li>• <a href="#">Sleep Disorders</a> (National Sleep Foundation)</li> <li>• <a href="#">Sleep Habits</a> (Anthem)</li> </ul>

**Sleep (continued)**

Offering	Type	Resources
Provide insurance coverage for testing and treatment for sleep disorders	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Work with local mattress retailer to provide guidance on selecting a mattress and offer discounts for school staff	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>

**Breastfeeding**

Breastfeeding is an important option that supports the physical and emotional health of mothers and babies. It reduces medical costs for mothers and children and provides protection against illness to the infant, which can reduce employee absences associated with caring for a sick child.<sup>54</sup> Providing lactation support also boosts employee retention, can promote an earlier return from maternity leave, and reduces the stress of returning to work.<sup>54</sup> In addition, time and accommodations to express milk in the workplace are protected by law.

Offering	Type	Resources
Implement policy to support breastfeeding	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Businesses Leading the Way in Support of Breastfeeding</a> (Eat Smart, Move More North Carolina)</li> <li>• <a href="#">Breastfeeding Policies at Work</a> (OWH)</li> <li>• <a href="#">Breastfeeding State Laws</a> (NCSL)</li> </ul>
Provide lactation rooms	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Businesses Leading the Way in Support of Breastfeeding</a> (Eat Smart, Move More North Carolina)</li> <li>• <a href="#">Breastfeeding Support: Industry Solutions- Education</a> (OWH)</li> <li>• <a href="#">Investing in Workplace Breastfeeding Programs and Policies</a> (National Business Group on Health)</li> <li>• <a href="#">Making it Work</a> (NYSDOH)</li> </ul>
Provide breastmilk storage	A	<ul style="list-style-type: none"> <li>• <a href="#">Investing in Workplace Breastfeeding Programs and Policies</a> (National Business Group on Health)</li> </ul>
Offer breastfeeding classes	A	<ul style="list-style-type: none"> <li>• <a href="#">Investing in Workplace Breastfeeding Programs and Policies</a> (National Business Group on Health)</li> <li>• <a href="#">Ready, Set, BABY</a> (University of North Carolina)</li> </ul>
Offer lactation counseling services	A	<ul style="list-style-type: none"> <li>• <a href="#">Investing in Workplace Breastfeeding Programs and Policies</a> (National Business Group on Health)</li> </ul>

**Breastfeeding (continued)**

Offering	Type	Resources
Provide lactation resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">Breastfeeding</a> (American Academy of Pediatrics)</li> <li>• <a href="#">For Nursing Moms: Breastfeeding at Work</a> (OWH)</li> <li>• <a href="#">Making it Work</a> (NYSDOH)</li> </ul>
Offer subsidies and/or insurance coverage for pumps	BD	<ul style="list-style-type: none"> <li>• <a href="#">Investing in Workplace Breastfeeding Programs and Policies</a> (National Business Group on Health)</li> </ul>
Allow time for breastfeeding/pumping during contracted work day	BD	<ul style="list-style-type: none"> <li>• <a href="#">Breastfeeding Support: Industry Solutions- Education</a> (OWH)</li> <li>• <a href="#">Investing in Workplace Breastfeeding Programs and Policies</a> (National Business Group on Health)</li> <li>• <a href="#">Making it Work</a> (NYSDOH)</li> <li>• <a href="#">Workplace Support in Federal Law</a> (USBC)</li> </ul>
Provide paid parental leave (separate from sick time, annual leave, or vacation time)	BD	<ul style="list-style-type: none"> <li>• <a href="#">Family-friendly Workplace Toolkit</a> (CDPHE)</li> </ul>

**Emergency preparedness**

The ability to respond to medical emergencies, disasters, and other crises is key to protecting the safety of staff (and students) while in school and to ensuring that employees feel secure and able to focus on their work.

Offering	Type	Resources
Develop, implement, and practice multi-hazard emergency response plan *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Disaster Preparedness Resources</a> (NASN)</li> <li>• <a href="#">Guide for Developing High-Quality Emergency Operations Plans</a> (US DOE)</li> <li>• <a href="#">K-12 School Security Practices Guide</a> (US DHS)</li> <li>• <a href="#">Multihazard Emergency Planning for Schools</a> (FEMA)</li> <li>• <a href="#">Resources for Schools</a> (Red Cross)</li> </ul>
Maintain well-marked, accessible AEDs *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">How to Maintain Your AED</a> (AED Brands)</li> <li>• <a href="#">Is Your AED Ready to Shock</a> (Occupational Health and Safety)</li> <li>• <a href="#">State Laws on Cardiac Arrest and Defibrillators</a> (NCSL)</li> </ul>
Maintain stock epinephrine and albuterol (where allowable in accordance with state laws and guidelines) *	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Asthma Medications in Schools</a> (ALA)</li> <li>• <a href="#">Toolkit to Manage Food Allergies in Schools</a> (CDC)</li> </ul>

**Emergency preparedness (continued)**

Offering	Type	Resources
Maintain emergency food, water, and medical supplies *	HSE	• N/A
Ensure building infrastructure meets current building codes *	HSE	• N/A
Form an emergency response team *	A	• N/A
Provide training for employees on first aid, CPR, and AEDs *	A	<ul style="list-style-type: none"> <li>• <a href="#">Fundamentals of a Workplace First-Aid Program</a> (OSHA)</li> <li>• <a href="#">Trainings for Your Organization</a> (Red Cross)</li> <li>• <a href="#">Workforce Training</a> (AHA)</li> </ul>
Provide professional development on emergency response	A	• N/A
Hang posters with symptoms of heart attack and stroke and instructions on how to respond	I	<ul style="list-style-type: none"> <li>• <a href="#">Heart Attack</a> (ACC)</li> <li>• <a href="#">Stroke</a> (ASA)</li> <li>• <a href="#">Workplace Health Resources- Heart Attack and Stroke</a> (CDC)</li> </ul>
Provide resources and information on identifying and responding to emergencies	I	• N/A

**Benefits**

Strong benefits design is a cornerstone of employee wellness initiatives. Comprehensive benefits allow employees to access the services needed to support their health and enable work-life balance. Programs to support employee awareness and understanding of the benefits available to them are also key.

See also the benefits design (BD) offerings under other topic areas.

Offering	Type	Resources
Offer health literacy classes	A	• <a href="#">Create a Health Literacy Plan</a> (CDC)
Offer classes on navigating insurance	A	• N/A
Designate nurses or other staff as navigators to assist employees in understanding and utilizing benefits	A	• N/A

Benefits (continued)

Offering	Type	Resources
Implement utilization campaign with incentives for using benefits (e.g., a \$5 gift card for anyone who uses the employee assistance program)	A	<ul style="list-style-type: none"> <li>N/A</li> </ul>
Hold employee benefits fair	A	<ul style="list-style-type: none"> <li>N/A</li> </ul>
Implement awareness campaign to promote existing benefits	I	<ul style="list-style-type: none"> <li>Check with your benefits providers for resources</li> </ul>
Provide paid time or flex time options for participation in disease management, stress management, or physical activity	BD	<ul style="list-style-type: none"> <li>N/A</li> </ul>
Offer flexible work schedules, as appropriate to position	BD	<ul style="list-style-type: none"> <li><a href="#">Family-friendly Workplace Toolkit</a> (CDPHE)</li> </ul>
Offer adequate paid sick and vacation time	BD	<ul style="list-style-type: none"> <li>N/A</li> </ul>
Allow employees to donate their paid time off to another employee	BD	<ul style="list-style-type: none"> <li><a href="#">Voluntary Shared Leave</a> (University of North Carolina Chapel Hill)</li> </ul>
Offer paid parental leave	BD	<ul style="list-style-type: none"> <li><a href="#">Family-friendly Workplace Toolkit</a> (CDPHE)</li> </ul>
Provide comprehensive insurance benefits including affordable premiums and out of pocket costs, no- or low-cost preventive services, and no- or low-cost coverage for medications for chronic disease, mental health, and substance use disorders	BD	<ul style="list-style-type: none"> <li>N/A</li> </ul>
Offer an Employee Assistance Program		<ul style="list-style-type: none"> <li><a href="#">Employee Assistance Programs</a> (Center for Workplace Mental Health)</li> <li><a href="#">Employee Assistance Programs: An Often Overlooked Resource</a> (APA)</li> </ul>

**Financial wellness**

When employees are struggling financially, the worry can affect their emotional health and ability to focus on their job. Financial struggles can also impact other aspects of health if an employee is unable to afford needed medical care, nutritious foods, safe housing, utilities, and other basic needs.

Offering	Type	Resources
Provide all employees with a livable wage for your locale	HSE	<ul style="list-style-type: none"> <li>• <a href="#">Living Wage Calculators</a> (NEA)</li> <li>• <a href="#">Living Wage Calculator</a> (Massachusetts Institute of Technology)</li> </ul>
Offer financial literacy workshops	A	<ul style="list-style-type: none"> <li>• <a href="#">Hold a Workshop</a> (Consumer Federation of America)</li> </ul>
Offer group or individual financial planning workshops	A	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Run financial fitness campaign to encourage financial “check-ups”	I	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
Provide financial resources and information	I	<ul style="list-style-type: none"> <li>• <a href="#">America Saves</a> (Consumer Federation of America)</li> <li>• <a href="#">MyMoney.gov</a> (MyMoney.gov)</li> <li>• <a href="#">National Foundation for Credit Counseling</a> (National Foundation for Credit Counseling)</li> </ul>
Provide retirement savings plan with automatic enrollment and employer contribution	BD	<ul style="list-style-type: none"> <li>• N/A</li> </ul>

Adapted from [Fostering School Employee Health, Well-being and Resilience: A Framework of Proven Strategies and Best Practices](#)

# Appendix 2 CHAPTER 2 RESOURCES



## Build support

### Worksheet: Initial outreach

Person or Group	Key points to convey to gain buy-in	How to involve	Plan for reaching out
<b>District and school leadership</b>			
<b>Employees</b>			
<b>Other stakeholders (e.g., benefits providers, unions, families)</b>			

### Sample initial communication to district and school leadership

About half of all adults have one or more chronic diseases, and many report health risk behaviors such as substance use, depression, stress, poor nutrition, and inadequate exercise. These health concerns and behaviors are linked with higher rates of staff absences as well as reduced productivity and performance. In fact, it is estimated that health-related lost productive time costs employers approximately \$1,685 per employee each year, which can negatively impact student achievement. In our district, [\[insert district-specific info about staff absences, healthcare costs, and other relevant data, if available\]](#).

Establishing an employee wellness initiative is an effective strategy to address these issues. A comprehensive, evidence-based employee wellness initiative can:

- Increase staff productivity, satisfaction, team cohesion, and effectiveness;
- Reduce staff absences and presenteeism (working while unwell at reduced capacity);
- Enhance retention and recruiting;
- Improve employee health and reduce health risks;
- Lower healthcare costs;
- Generate a positive return on investment of over \$3 for every \$1 invested; and
- Improve student outcomes and create a healthy and supportive environment for everyone in the school.

Supporting employee wellness aligns with [\[insert relevant info here about connection to district mission, school improvement goals, accountability measures, use of WSCC model, etc. and how employee wellness initiative can help accomplish these goals and priorities\]](#).

There are many simple, no-cost ways to improve employee wellness. Many school districts have been able to successfully implement employee wellness initiatives and have seen positive results. For example, [\[insert local example or use one of the success stories in this guide\]](#). With our district's strong team and commitment to health, I know we can achieve similar results.

[\[Insert information about next steps and/or what you would like the recipient to do\]](#).

Thank you,

[\[Name, position, and contact information\]](#)

### Sample initial communication to staff

Each and every school day, you work tirelessly to ensure that our students have the best learning experience possible. From educators to facilities staff to the business office, each member of our team works hard to help students succeed. I know that for many of you, your days and evenings are hectic, and work often spills over into your personal time, making it difficult to find time to take care of your own needs.

I am excited to announce that we will be launching a new employee wellness initiative to better support you in caring for yourself. This is not just about salads and sit-ups. Our goal is to support your physical, emotional, social, intellectual, and financial health. We are starting this initiative because we value you and want to create a work environment that fosters wellness. I know many of you have a “students first” mindset. We encourage you to take the time to participate in this initiative as it is essential that you look after yourself if you want to be at your best for the students. We will do our part to make it as easy to participate as possible.

During the coming months, we will be reaching out to collect your feedback through surveys and also will be offering health assessments to get a sense of what types of programs might be helpful and of interest. In collecting this information, we will be following strict protocols to protect your privacy. Our district staff will not have access to identifiable health information, and surveys will be anonymous. Participation is completely voluntary and choosing not to participate will in no way impact your employment here. Every individual has different needs and interests, and our only purpose is to provide the environment, programs, and other supports that allow you to pursue your own health goals.

We will be convening a committee to guide this initiative with representatives of the multiple types of positions we have in our district. We will also be enlisting wellness champions at each school. We will share more details soon and welcome your participation and input. Please contact [\[insert contact info\]](#) with any questions.

[\[Name and position\]](#)

# Appendix 3 CHAPTER 3 RESOURCES



## Assemble your team

### Worksheet: Employee wellness team

#### Committee

Committees currently working on health and wellness or related issues:

Committee identified to lead employee wellness:

New    Existing

Additional representatives needed to ensure diverse skills and perspectives:

How new members will be recruited:

Term limits:

Time commitment:

#### Leader(s)

How an employee wellness leader(s) (e.g., committee chair or employee wellness coordinator) will be identified:

Time allocated:

Key responsibilities:

#### Champions

How champions will be recruited:

Key responsibilities:

Term limits:

Time commitment:

How champions will be oriented to their role:

## Sample committee charter template

**Scope:** *Example: The committee will take the lead on issues pertaining to employee wellness in coordination with the SHAC, which leads student wellness.*

**Purpose:** *Example: To develop a school culture and environment that supports wellness*

**Resources available:** *Example: 0.3 FTE employee wellness coordinator and \$25 per employee budget*

**Decisions that can be made by our committee:** *Examples: Use of allocated budget, selection of activities and events, communications with employees*

**Decisions requiring approval:** *Examples: Any activities for which staff participation would be required (not optional), benefits changes, policy and infrastructure changes, contracts or agreements, communications with media*

**Member roles and responsibilities:** *See p. 21 for examples*

**Meeting frequency and format:** *Example: The group will meet the second Thursday of every month at 6:30 am at the district office*

**Decision-making process:** *Typical options are by consensus, by simple majority, by 2/3 majority*

**Tools we will use to facilitate communication:** *Options include email, Dropbox, Google Docs, Free Conference Call, etc.*

**Expectations/norms for how our committee will operate:** *Example: Everyone will participate, everyone will share responsibility for and commitment to our goals, everyone will complete their assigned tasks, everyone's contribution will be respected and valued*

# Appendix 4 CHAPTER 4 RESOURCES



## Gather information

### Worksheet: Planning information

#### Employee needs and interests

How we will collect information about employee needs and interests:

- Survey    Interviews    Focus Group    Conversations    Other

When information will be collected:

Key findings:

#### Existing programs and supports

How we will collect information about existing programs and supports:

When information will be collected:

Key findings:

**Worksheet: Planning information (continued)**

District and community resources	
District/school staff to reach out to:	Key supports they can provide:
Potential partners to reach out to:	Key supports they can provide:
Potential funding sources:	
Other information	
Summary of results and potential wellness topics to address	

## Sample communication to employees

As you may know, our district is launching an employee wellness initiative to support your physical, emotional, social, intellectual, and financial health. We value everything you do to make this district a place where students can thrive, and we want to make sure that you are thriving, too.

Our goal is to design the wellness initiative around your needs and interests, and to do so, we need your help. First, we ask that you take five minutes to respond to a survey by following the link below. Your responses will be anonymous. We are considering a range of wellness programs, and this information will help us select activities that you will find convenient, fun, and valuable. As an added bonus, you will receive a code after completing the survey that you can submit to enter a raffle for a [incentive].

[insert survey link]

Second, we are excited to announce that one of our insurers, [company name], will be on-site [date] to provide free screenings and health assessments for all employees. If you choose to participate, you will receive a summary of your results along with personalized recommendations for ways to improve your health. Please note that your individual results will be completely confidential, and our district will only receive aggregate data (for example, the percentage of employees throughout the district with high cholesterol). By participating, you will receive valuable information about your health, and will also help us identify common health concerns in our district so that we can develop programs to address those concerns. Please see the attached flyer for more information.

[Name, position, and contact information]

## Employee wellness laws, ethical principles, and other considerations

*Note: This information is provided for educational purposes only and is not intended as legal advice. Laws and regulations are subject to change and vary by jurisdiction. Districts and schools should always consult their own legal counsel regarding compliance.*

Though legal violations are rare, it is important to be aware of relevant laws and regulations. Consult with an attorney and discuss the initiative with insurers and worker's compensation regulators.

### Key federal laws

- **The Americans with Disabilities Act (ADA):** Prohibits denying access to wellness programs based on disability, provides guidelines for conducting medical examinations as part of wellness programs, sets requirements for the collection and safeguarding of health information, limits the value of incentives, and requires that wellness programs be voluntary.

- **The Health Insurance Portability and Accountability Act (HIPAA):** Sets limits on the value of incentives and stipulates that individually identifiable health information is protected under HIPAA when wellness programs are offered through a group health plan.
- **Genetic Information Nondiscrimination Act (GINA):** Restricts the collection, use and sale of genetic information and sets limits on the value of incentives.
- **Affordable Care Act (ACA):** Requires reasonable alternatives to be offered for earning incentives and sets limits on the value of incentives.

### ***Ethical principles***

- **Privacy:** Ensure that employee privacy is protected.
- **Equity and inclusion:** Provide opportunities and accommodations so that all employees can participate, including those with health concerns and/or disabilities. Ensure that health status does not impact insurance coverage, assessment of job performance, or employment status.
- **Choice:** Participation should be voluntary, and employees should not be penalized in any way for non-participation. Incentives should not be so substantial that they are coercive.

### ***Other considerations***

- Comply with any state laws pertaining to worksite wellness programs and/or ethics laws that affect gifts, incentives, and use of school space by employees.
- Research the tax implications of providing incentives.
- Address insurance implications and liability concerns. For example, it may be necessary to have employees sign a waiver prior to participating in exercise programs.
- Ensure alignment with any relevant district policies and procedures.

### ***Resources***

- [Fact Sheet: Final Rule on Employer Wellness Programs and Title I of the Americans with Disabilities Act](#) (US Equal Employment Opportunity Commission)
- [Genetic Information Nondiscrimination Act](#) (Federal Register)
- [HIPAA Privacy and Security and Workplace Wellness Programs](#) (US Department of Health and Human Services)
- [Interim Final Rules Prohibiting Discrimination Based on Genetic Information in Health Insurance Coverage and Group Health Plans](#) (Departments of the Treasury, Labor, and Health and Human Services)
- [Lawsuits Focused on Wellness Program Compliance](#) (JDSUPRA)
- [Wellness Programs and Incentives](#) (Cigna)

# Appendix 5 CHAPTER 5 RESOURCES



## Plan for success

### Example measures for demonstrating results

Type of measure	Ways to collect data	Ways to analyze data
<p><b>Process measures</b>  <i>Process measures evaluate the scope of the initiative and how well it is being implemented. Process measures show what is being done, for whom, and how well. Collecting these measures will help you identify what is working and what changes need to be made.</i></p>		
Number and types of activities held	<ul style="list-style-type: none"> <li>• Work plan</li> <li>• Registration information</li> </ul>	<ul style="list-style-type: none"> <li>• Total numbers</li> <li>• Comparison of numbers year-to-year</li> </ul>
Participation, including number of participants in each activity and their demographics	<ul style="list-style-type: none"> <li>• Registration information</li> <li>• Sign-in sheet</li> </ul>	<ul style="list-style-type: none"> <li>• Total numbers</li> <li>• Percentage</li> <li>• Percentage by demographic category</li> <li>• Comparison of numbers year-to-year</li> </ul>
Use of resources, such as clicks on website and newsletter opens	<ul style="list-style-type: none"> <li>• Website and e-newsletter analytics</li> </ul>	<ul style="list-style-type: none"> <li>• Total numbers</li> <li>• Percentage</li> <li>• Comparison of numbers year-to-year</li> </ul>
Experience/satisfaction of participants	<ul style="list-style-type: none"> <li>• Survey</li> <li>• Focus group</li> <li>• Conversations or interviews with participants</li> <li>• Observation of classes/activities to assess quality and logistics</li> </ul>	<ul style="list-style-type: none"> <li>• Percentage</li> <li>• Percentage by demographic category</li> <li>• Quotes and testimonials</li> </ul>
Changes to create a healthy school environment (policies, practices, norms, and infrastructure)	<ul style="list-style-type: none"> <li>• Policy documents</li> <li>• Observation</li> <li>• Conversations or interviews with employees</li> <li>• Repeat assessment using School Health Index or Worksite Health Scorecard</li> </ul>	<ul style="list-style-type: none"> <li>• List of changes</li> <li>• Quotes and testimonials</li> <li>• Assessment tool results</li> </ul>

Example measures for demonstrating results (continued)

Type of measure	Ways to collect data	Ways to analyze data
<p><b>Outcome measures</b></p> <p><i>Outcome measures evaluate the impact of the initiative on employees. These measures show what changes are happening as a result of the initiative. Collecting these measures will help you determine whether your initiative is improving employee wellness.</i></p>		
Knowledge, attitudes, motivation, self-efficacy	<ul style="list-style-type: none"> <li>Retrospective or pre- and post-survey (see glossary for definitions)</li> <li>Conversations or interviews with employees</li> </ul>	<ul style="list-style-type: none"> <li>Percentage showing improvement</li> <li>Averages before vs. after</li> <li>Quotes and testimonials</li> </ul>
Skills	<ul style="list-style-type: none"> <li>Retrospective or pre- and post-survey</li> <li>Skills test or observation</li> </ul>	<ul style="list-style-type: none"> <li>Percentage showing improvement</li> <li>Averages before vs. after</li> </ul>
Health behaviors (e.g., improved diet, increased physical activity, increased sleep)	<ul style="list-style-type: none"> <li>Retrospective or pre- and post-survey</li> <li>Conversations or interviews with employees</li> <li>Health assessments</li> <li>Daily or weekly logs</li> </ul> <p><i>Note: Logs work best as part of a campaign or activity. For example, if having a physical activity challenge, participants can submit a log of their daily physical activity.</i></p>	<ul style="list-style-type: none"> <li>Total numbers (e.g. of steps taken, fruit and vegetables consumed, etc.)</li> <li>Percentage meeting recommendations</li> <li>Percentage showing improvement</li> <li>Averages before vs. after</li> <li>Quotes and testimonials</li> <li>Change in health assessment results</li> </ul>
Morale, climate, culture, productivity, quality of life	<ul style="list-style-type: none"> <li>Retrospective or pre- and post-survey</li> <li>Focus group, conversations or interviews with employees</li> <li>Observation</li> </ul>	<ul style="list-style-type: none"> <li>Percentage identifying improvement</li> <li>Quotes and testimonials</li> <li>Averages before vs. after</li> </ul>
Benefits utilization, insurance claims, healthcare costs	<ul style="list-style-type: none"> <li>Data from benefits providers</li> </ul>	<ul style="list-style-type: none"> <li>Percentage change</li> <li>Spending or utilization before vs. after</li> <li>Average per employee before vs. after</li> </ul>
Absences, retention, recruitment	<ul style="list-style-type: none"> <li>District data</li> <li>Conversations or interviews with employees</li> </ul>	<ul style="list-style-type: none"> <li>Percentage change</li> <li>Averages before vs. after</li> <li>Quotes and testimonials</li> </ul>
Biomarkers	<ul style="list-style-type: none"> <li>Biometric screenings</li> </ul>	<ul style="list-style-type: none"> <li>Percentage showing improvement</li> <li>Average results compared to previous years</li> </ul>



**Comprehensive work plan template**

<p><b>Goal 1:</b>  <i>Example: By 2020, improve employee productivity and reduce absences by 5% by supporting employee wellness.</i></p> <p><b>Offerings:</b>  <i>Example: physical activity breaks, onsite flu shots, teacher break cards</i></p> <p><b>Objectives:</b>  <i>Example:</i></p> <ul style="list-style-type: none"> <li>• <i>By October of this school year, implement three 5-minute physical activity breaks for staff and students during each school day with 80% staff participation.</i></li> <li>• <i>By November of this school year, immunize 40% of staff through onsite flu shot clinics.</i></li> <li>• <i>By November of this year, implement break cards for instructional staff (1 card each semester for a colleague to take over the class for 15 minutes).</i></li> </ul>	<p><b>Outcome measures:</b>  <i>Example:</i></p> <ul style="list-style-type: none"> <li>• <i>% of staff reporting increased productivity and wellness</i></li> <li>• <i>amount of change in absences</i></li> </ul> <p><b>Process measures:</b>  <i>Example:</i></p> <ul style="list-style-type: none"> <li>• <i>% of staff participating in activity breaks</i></li> <li>• <i>% of staff with positive view of activity breaks</i></li> <li>• <i>% of staff immunized</i></li> <li>• <i>% of staff satisfied with flu clinics</i></li> <li>• <i>% of instructional staff using break cards</i></li> </ul>
<p><b>GOAL 1:</b></p> <p><b>Offerings:</b></p> <p><b>Objectives:</b></p>	<p><b>Outcome measures:</b></p> <p><b>Process measures:</b></p>
<p><b>GOAL 2:</b></p> <p><b>Offerings:</b></p> <p><b>Objectives:</b></p>	<p><b>Outcome measures:</b></p> <p><b>Process measures:</b></p>

**Comprehensive work plan template (continued)**

<p><b>GOAL 3:</b></p> <p><b>Offerings:</b></p> <p><b>Objectives:</b></p>		<p><b>Outcome measures:</b></p> <p><b>Process measures:</b></p>	
Action steps	Person(s) responsible	Deadline	Resources needed
<p><i>Example:</i> Create list of exercises for physical activity breaks</p> <p>Introduce plan for activity breaks to staff and collect feedback</p>	<p>Sara</p> <p>Anton</p>	<p>10/1</p> <p>10/7</p>	<p>Websites with activity break ideas</p> <p>Time during staff meeting</p>

# Appendix 6 CHAPTER 6 RESOURCES



## Maximize your impact

### Worksheet: Communications outline

Topic or Purpose	Audience(s)	Message/Key information to include	Format(s)	When to distribute	Person responsible

**Worksheet: Participation strategies**

Strategies for boosting participation	How we will incorporate
Provide recognition	
Demonstrate leadership support	
Create opportunities for participation during worktime	
Provide options	
Make it fun	
Offer incentives	
Connect to personal motivations	
Make it automatic	

**Offering incentives: Do's and don'ts**

DO	DON'T
<ul style="list-style-type: none"> <li>• Consider no- or low-cost incentives such as certificates.</li> <li>• Provide incentives for participation as well as for achievements.</li> <li>• Reach out to community partners for donated goods and services to use as incentives.</li> <li>• Be aware of legal restrictions, ethical issues, and tax implications (see p. 69).</li> </ul>	<ul style="list-style-type: none"> <li>• Don't rely on incentives alone; they should be one small piece of the initiative.</li> <li>• Don't pass up incentives offered by your benefits providers.</li> <li>• Don't forget to promote incentives.</li> <li>• Don't tie incentives to insurance premiums, deductibles or other coinsurance, as there is a risk of discrimination.<sup>55</sup></li> </ul>

# Appendix 7 CHAPTER 7 RESOURCES



## Demonstrate results

### Worksheet: Data collection and sharing

<p><b>MEASURE 1:</b></p> <p>How and when data will be collected:</p>   <p>How and when data will be analyzed:</p>  <p>Person responsible: Results:</p>	<p><b>MEASURE 2:</b></p> <p>How and when data will be collected:</p>   <p>How and when data will be analyzed:</p>  <p>Person responsible: Results:</p>
<p><b>MEASURE 3:</b></p> <p>How and when data will be collected:</p>   <p>How and when data will be analyzed:</p>  <p>Person responsible: Results:</p>	<p><b>MEASURE 4:</b></p> <p>How and when data will be collected:</p>   <p>How and when data will be analyzed:</p>  <p>Person responsible: Results:</p>

**Worksheet: Data collection and sharing (continued)**

How results will be shared with stakeholders:

Audience(s)	Format(s)	Key results to include	When to distribute	Person responsible

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## General Resources

- [Employee Wellness Resources](#) (Alliance for a Healthier Generation)
- [School Employee Health and Well-being](#) (OEA Choice Trust)
- [Thrive at Work Resource Center](#) (Kaiser Permanente)
- [Thriving Schools](#) (Kaiser Permanente)
- [Virtual Healthy School](#) (CDC)
- [Workplace Health Resource Center](#) (CDC)
- [Workplace Wellness: Walk This Way](#) (ChangeLab Solutions)
- [Worksite Wellness Resource Kit](#) (Wisconsin Department of Health Services)
- [WorkWell NC](#) (WorkWell NC)

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## Glossary

**Benefits providers:** health, dental, and vision insurers; prescription benefit providers; employee assistance plan providers; and worker’s compensation providers

**Chronic disease:** a disease that cannot be passed from person to person and lasts longer than three months, such as heart disease, stroke, and diabetes

**Disease management:** equipping individuals to minimize the effects of a disease through improved management of the condition

**Health:** “a state of complete physical, mental, and social wellbeing and not merely the absence of disease or infirmity”<sup>56</sup>

**Healthy school environment:** policies, practices, norms, and physical infrastructure that support wellness

**Health promotion:** the process of assisting people in improving their health through education, behavior changes, and environmental changes

**Offering:** program, class, policy change, event, etc. that is implemented to improve employee wellness

**Outcome measure:** indicator that measures the impact of the initiative

**Pre- and post-survey:** survey administered at the beginning of a class, campaign, policy change, etc. and then repeated at the end to compare the results

**Presenteeism:** working while unwell at reduced capacity

**Process measures:** indicator that measures how well the initiative is being implemented

**Retrospective survey:** one survey administered at the end of a class, campaign, policy change, etc. that asks employees whether their knowledge, skills, behaviors, etc. have changed as a result of their participation

**School improvement plan:** a plan that defines how the school will work to increase student achievement

**Self-efficacy:** belief in one’s ability to perform a certain behavior

**Staff:** individuals employed by the school district

**Stakeholder:** any person or organization that affects or is affected by an initiative

**Well-being:** the presence of positive emotions and resilience, satisfaction with life, feeling healthy and energetic, fulfillment, and positive functioning<sup>57</sup>

**Wellness:** “a process of becoming aware of and making conscious choices toward a more balanced and healthy lifestyle”<sup>2</sup>

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## Acronyms

**AAFA-** Asthma and Allergy Foundation of America

**ACC-** American College of Cardiology

**ACS-** American Cancer Society

**ADA-** American Diabetes Association

**AFHK-** Action for Healthy Kids

**AHA-** American Heart Association

**ALA-** American Lung Association

**APA-** American Psychiatric Association

**ASA-** American Stroke Association

**CDC-** Centers for Disease Control and Prevention

**CDPHE-** Colorado Department of Public Health and Environment

**EPA-** Environmental Protection Agency

**FEMA-** Federal Emergency Management Association

**HA-** Health Assessment

**HERO-** Health Enhancement Research Organization

**NANA-** National Alliance for Nutrition and Activity

**NASN-** National Association of School Nurses

**NCSL-** National Conference of State Legislatures

**NCTSN-** National Child Traumatic Stress Network

**NDEI-** National Diabetes Education Initiative

**NEA-** National Education Association

**NHLBI-** National Heart, Lung and Blood Institute

**NIOSH-** National Institute for Occupational Safety and Health

**NYSDOH-** New York State Department of Health

**OSHA-** Occupational Safety and Health Administration

**OWH-** Office of Women’s Health

**PCFSN-** President’s Council on Fitness, Sports, and Nutrition

**ROI-** Return on Investment

**SAMHSA-** Substance Abuse and Mental Health Services Administration

**SHAC-** School Health Advisory Council

**USBC-** United States Breastfeeding Committee

**US DHS-** United States Department of Human Services

**US DHHS-** United States Department of Health and Human Services

**US DOE-** United States Department of Education

**VOI-** Value on Investment

**WA SDOH-** Washington State Department of Health

**WSCC-** Whole School, Whole Community, Whole Child

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